CMIPS II
REQUEST FOR PROPOSAL
HHSDC 4130-141A

Section 9
PROPOSAL FORMAT

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1   INTRODUCTION

These instructions describe the mandatory proposal format and the approach for the development and presentation of proposals. Format instructions must be adhered to, all requirements and questions in the Request for Proposal (RFP) must be responded to, and all requested data must be supplied. The Bidder shall carefully examine the RFP and be satisfied as to the conditions to be complied with, prior to the Bidder submitting a proposal.

Submissions include a Letter of Intent to Bid, a Draft Proposal, and the Final Proposal.

All submissions must be clearly labeled "RFP HHSDC 4130-141A", identified as "LETTER OF INTENT TO BID", "DRAFT PROPOSAL", or "FINAL PROPOSAL", and include the Bidder's name.

It is the responsibility of the Bidder to ensure that the Proposals are received by the Procurement Official at the Department of General Services by the date and time identified in Section 1, INTRODUCTION AND OVERVIEW OF REQUIREMENTS, Paragraph 5, Key Action Dates. If mailed, it is suggested that you use certified or registered mail with return receipt requested.

2   PROPOSAL FORMAT AND CONTENT

The Draft Proposal and Final Proposal shall be completely sealed and one (1) complete set of all required volumes clearly marked "MASTER COPY." Each sealed Proposal container must be labeled as follows:

>   The Name of Bidder
>
>   RFP HHSDC 4130-141A
>
>   (Draft Proposal, or Final Proposal)

1. The Master copy of each proposal submitted shall be separately sealed and properly identified.
2. **No actual cost information shall be submitted with the Draft Proposal.** In the Draft Proposal, any cost information shall be replaced with XXXs.
3. **Cost information is only to be submitted with the Final Proposal**.
    a. The Final Proposal cost information (Volume 3) must be duplicated, sealed, properly identified, and submitted with, but separate from, the other sections of the Final Proposal, as required in Section 2, RULES GOVERNING COMPETITION, Paragraph 3.9.6, Delivery of Proposals.
    b. No cost information shall be included in the Final Proposal Volume 1 and Volume 2.
4. Proposals must respond to all requirements in the RFP. Requirements must be addressed in the order they are presented in the RFP.
5. All non-standard pages in the Proposal (e.g., charts, diagrams, etc.) may be foldouts. If foldouts are used, the folded size must fit within an 8 ½ x 11 format.
6. The following information must be shown on each page (except where inappropriate, e.g., pre-printed documentation, etc.) of the Proposal:

>   RFP HHSDC 4130-141A
>
>   The Name of Bidder

The Proposal Volume Number

The Proposal part or exhibit number

The page number

7. Page numbers must be located in the same page position throughout the Proposal. Figures Tables, Charts, etc. should be assigned index numbers and must be referenced by these numbers in the Proposal text and in the Proposal Table of Contents. Figures, Tables, Charts, etc. should be placed as close as possible to the text that references them. In addition to the Proposal Table of Contents, each section must have an individual Table of Contents. Paragraph numbering must follow the same scheme as the RFP.

8. Each hard copy of the Proposal must be provided in three-ring binders.

9. All soft copies must be prepared and saved using Microsoft Office tools. PDF files are not acceptable.

10. All soft copy proposal information must be presented on one or more non-rewritable CDs. The Cost Proposal information, using the required Excel spreadsheets, must be on a separate CD from the rest of the proposal, properly identified and sealed in the Cost Proposal.

11. CDs must be labeled with the following information:

RFP HHSDC 4130-141A

The Name of Bidder

The Proposal Volume Number(s)

The Proposal part(s) or exhibit number(s)

12. If color is used in proposals, all copies must be in color.

13. In the event there is a discrepancy between the electronic copy and the Master paper copy, the Master paper copy shall have precedence over the electronic copy. The Master paper copy shall have precedence over all other paper copies.

14. At a minimum, the Bidder must deliver the number of copies specified in Table 1 and Table 2 below.

3   LETTER OF INTENT TO BID

The Letter of Intent to Bid will be used to identify Bidders who want to participate in the RFP steps and receive information during the bid process. The Letter of Intent to Bid shall conform to specifications in Section 2, RULES GOVERNING COMPETITION, Paragraph 3.3, Letter of Intent to Bid. A sample can be found in Exhibit 9-1 Letter of Intent to Bid.

4   RECEIPT OF PROPOSALS

The Draft and Final Proposals will be date and time marked as they are received, and verified that all responses are submitted under an appropriate cover, sealed and properly identified.

5   DRAFT PROPOSAL FORMAT AND CONTENT

The Draft Proposal must contain all the material specified below for the Final Proposal **except cost figures**. The Contract **must also be included with products and services identified, but no cost figures included.** The Contract need **not** be signed at this point. It is **important that all sheets**, with all entries **except cost figures**, be included. **Inclusion of cost figures in the Draft Proposal may result in elimination of the Bidder from further participation in the**

procurement process. The complete Draft Proposal must be submitted by the date and time specified in Section 1, INTRODUCTION AND OVERVIEW OF REQUIREMENTS, Paragraph 5, Key Action Dates.

All cost data for the Draft Proposal must use XXXs in place of actual dollar amounts.

Table 1. Draft Proposal Copies

ITEM	# MASTER COPIES	# OTHER COPIES
Volume 1 - Response to Requirements	One (1) Hard, One (1) Soft	Seven (7) Hard, One (1) Soft
Volume 2 – Contract	One (1) Hard, One (1) Soft	Seven (7) Hard, One (1) Soft
Volume 3 – Cost Proposal (using XXXs in place of actual dollar amounts)	One (1) Hard, One (1) Soft	Seven (7) Hard, One (1) Soft

6   FINAL PROPOSAL FORMAT AND CONTENT

This section describes in more detail the content and format of the individual sections of each Volume of the Final Proposal. The complete Final Proposal must be submitted on the date and time specified in Section 1, INTRODUCTION AND OVERVIEW OF REQUIREMENTS, Paragraph 5, Key Action Dates, and must contain, at a minimum, the following copies:

Table 2. Final Proposal Copies

ITEM	# MASTER COPIES	# OTHER COPIES
Volume 1 - Response to Requirements	One (1) Hard, One (1) Soft	Seven (7) Hard, One (1) Soft
Volume 2 – Contract	One (1) Hard, One (1) Soft	Seven (7) Hard, One (1) Soft
Volume 3 – Cost Proposal	One (1) Hard, One (1) Soft	Seven (7) Hard, One (1) Soft

The Final Proposal must include the following items:

Volume 1 — Response to Requirements

This volume must contain all responses to the ADMINISTRATIVE REQUIREMENTS and TECHNICAL REQUIREMENTS of the RFP. All forms and exhibits, **EXCEPT for cost data**, must be completed and included in this Volume. The organization is to be as follows:

Tab 1   General (Cover Letter, Proposal Transmittal Form, Executive Summary, Table of Contents and Literature)

Tab 2   Administrative Requirements Response

Tab 3   System Requirements Response

Tab 4   Statement of Work Response

Tab 5   Corporate References

Tab 6   System Requirements Plans and Documents

Tab 6.1   Architecture Design Specification

Tab 6.2   Concept of Operations Scenarios

Tab 6.3   Capacity Management Plan

Tab 7   Project Management Plans and Documents

Tab 7.1   Project Master Plan

Tab 7.2   Master Work Plan

Tab 7.3   Project Staffing Plan

Tab 7.4   Key Staff

Tab 7.5   Statement of Work Traceability Matrix

Tab 8   Proposal Exhibits

Volume 2 — Contract

This volume must contain the Contract terms and conditions and all Exhibits or Attachments, complete in every detail, except for cost information. **Do not include cost information in this volume.**

Volume 3 — Cost Proposal

This volume **must** be in a **separately sealed envelope or container** and clearly marked "COST PROPOSAL FOR RFP HHSDC 4130-141A" as required in Section 2, RULES GOVERNING COMPETITION, Paragraph 3.9.6, Delivery of Proposals. This volume must contain all completed cost sheets and any other documents with cost data identified as required in this RFP. The organization of the exhibits from Artifact 18 and the related instructions in Section 8, COST INSTRUCTIONS, must be as follows:

Tab 1   Cost Methods and Assumptions

Tab 2   Total Proposal Cost Summary Exhibit Instructions

Tab 3   DDI Phase Cost Instructions

Tab 4   M&O Phase Cost Instructions

Tab 5   Miscellaneous Cost Exhibits Instructions

Tab 6   Contract Instructions

6.1   Volume 1 – Response to Requirements

This Volume must contain all responses to Section 5, ADMINISTRATIVE REQUIREMENTS, Section 6, TECHNICAL REQUIREMENTS - Statement of Work (SOW) (hereinafter referred to as Section 6, SOW) and Section 6, TECHNICAL REQUIREMENTS - System Requirements Specification (SyRS) (hereinafter referred to as Section 6, SyRS). All forms and exhibits, except for cost data, must be completed and included in this Volume. Each page must be numbered as described above. Volume 1 must be in the order and format indicated below.

6.1.1 Tab 1 - General

This section must contain a Cover Letter, Proposal Transmittal Form, Executive Summary and Table of Contents.

Cover Letter

The Cover Letter must be prepared and signed in accordance with Section 2, RULES GOVERNING COMPETITION, Paragraph 3.9.5, Signature of Proposal. The Cover Letter should be on the Bidder's official business letterhead stationery. Cost information must not be included in the Cover Letter. The Cover Letter must be included as the first item in Volume 1.

Proposal Transmittal Form

The Proposal Transmittal Form, Exhibit 9-2, must be completed and signed by a person authorized to bind the company. The Proposal Transmittal Form serves to validate the Bidder's offer and agreement to the terms and conditions of the RFP. The Bidder, (1) acknowledges and agrees to the terms and conditions of this RFP, (2) agrees that it will provide the goods and services detailed in its proposal, for the price quoted, and (3) affirms that the person signing the Proposal Transmittal Form has contractual authority to bind the bidding company.

Executive Summary

The Executive Summary must contain a summary of the salient features of the Proposal. The Executive Summary must condense and highlight the contents of the Proposal to provide a broad understanding of the entire Proposal and to facilitate the evaluation of the Proposal by the State. This section must contain a discussion that demonstrates the Bidder's understanding of the nature and purpose of the CMIPS Project, and benefits that can be expected by implementing the proposed solution. This section must also provide a conceptual overview of the proposed system, including proposed hardware, operating system, software, and technical architecture. This section must also provide a conceptual overview of the proposed project plan, including a high-level approach and schedule for system development, implementation, training, maintenance, and operations. Cost information must not be included in the Executive Summary.

Table of Contents

The Table of Contents must list all major parts of the Proposal, including exhibits, and must be identified by volume, tab number, paragraph number, and page number. All figures, charts, graphs, and tables must be identified by index number and page number.

Literature

Any literature used by the Bidder to support the proposal should be located as an exhibit in the Tab in which it is first referenced. The Bidder shall not change the numbering identified in this document for the required exhibits; the literature exhibit(s) shall be included and numbered sequentially following any required exhibits.

6.1.2 Tab 2 – Administrative Requirements Response

All requirements in Section 5, ADMINISTRATIVE REQUIREMENTS, Paragraph 2, Bidder Responsibility, and Paragraph 3, Administrative Requirements, are mandatory.

Bidders must state compliance to each requirement by completing the legend found at the end of each requirement. Section 5, ADMINISTRATIVE REQUIREMENTS, must be included and inserted into Volume 1, Tab 2, in its entirety with appropriate responses checked:

Bidder agrees to the above requirement? YES _____NO _____

Failure to respond affirmatively to a requirement may cause the Proposal to be rejected. The Bidder must indicate "YES," which certifies a commitment to the performance of each requirement under the direction of the CMIPS Project Office while adhering to all specified standards and maintenance procedures as identified in each requirement. A "NO" response to any requirement may result in disqualification of the Bidder.

Certifications, Preferences and detailed information required by Section 5, ADMINISTRATIVE REQUIREMENTS must be included as Exhibits to Volume 1 as listed in Paragraph 6.1.8, Tab 8 – Proposal Exhibits.

6.1.3 Tab 3 – System Requirements Response

Proposal Volume 1, Tab 3 must contain a response for each item (all paragraphs and subparagraphs) identified in Section 6, SyRS.

The Bidder must acknowledge and agree to each paragraph and subparagraph requirement. Bidders must state compliance to each requirement by completing the legend found at the end of each requirement. Section 6, SyRS must be included and inserted into Volume 1, Tab 3, in its entirety with appropriate responses checked:

Bidder agrees to the above requirement? YES _____NO _____

Failure to respond affirmatively to a mandatory requirement in Section 6, SyRS will cause the Proposal to be rejected. The Bidder must indicate "YES," which certifies a commitment to the performance of each requirement under the direction of the CMIPS Project Office while adhering to all specified standards and maintenance procedures as identified in each requirement. A "NO" response to any requirement may result in disqualification of the Bidder.

6.1.4 Tab 4 – Statement of Work Response

Proposal Volume 1, Tab 4, must contain a response for each item (all paragraphs and subparagraphs) identified in Section 6, SOW.

It is necessary that each paragraph and subparagraph requirement be acknowledged and agreed to. Bidders must state compliance to each requirement by completing the legend found at the end of each requirement. Section 6, SOW must be included and inserted into Volume 1, Tab 4 in its entirety with appropriate responses checked:

Bidder agrees to the above requirement? YES _____NO _____

Failure to respond affirmatively to a mandatory requirement in Section 6, SOW will cause the Proposal to be rejected. The Bidder must indicate "YES," which certifies a commitment to the performance of each requirement under the direction of the CMIPS Project Office while adhering to all specified standards and maintenance procedures as identified in the RFP and as may later be specified by the State. A "NO" response to any requirement may result in disqualification of the Bidder.

6.1.5 Tab 5 - Corporate References

The Bidder shall present Corporate References as defined in Section 5, ADMINISTRATIVE REQUIREMENTS, Paragraph 3.3, Corporate References.

6.1.6 Tab 6 – System Requirements Plans and Documents

The following system plans and documents must be developed and included in Proposal Volume 1, Tab 6.

6.1.6.1 Tab 6.1 – Architecture Design Specification

The Architecture Design Specification (ADS) defines the technical components the Bidder proposes to support the requirements defined in Section 6, SOW and Section 6, SyRS. This includes all hardware and software components and all hardware platforms, including development, maintenance, test, and production.

Preparation Instructions

1. The ADS shall include a title page.
2. The ADS shall contain a table of contents providing the number, title, and page number of each titled paragraph, figure, table, and appendix.
3. The ADS shall provide page numbering/labeling. Each page shall contain a unique page number and display the document number, including version, volume, and date.
4. The ADS is supplemented by:
   a. One or more diagrams illustrating all the software and hardware components and how they interact
   b. Component configurations required to support the solution
   c. Bandwidth specifications for all network components required to support the requirements
5. The Bidder shall refer to the supplemental documents as needed to minimize redundant responses.

Content Requirements

1. The Bidder shall develop, and deliver, an Architecture Design Specification (ADS), that meets the requirements of Section 6, SOW, Paragraph 4.1.5, Architecture Design Specification (ADS).
2. The Bidder shall prepare the ADS with a format using the document organization with the heading numbers and titles identified in columns 1 and 2 of Table 3. Architecture Design Specification Format.
3. The Bidder shall describe how they will meet the requirements stated in the associated paragraphs in Section 6, SOW, and Section 6, SyRS, as indicated by the "SOW/SyRs Reference" in column 3 of Table 3. The Bidder shall also describe how they will meet the referenced standards as described and tailored in columns 4 and 5 of Table 3.
4. The Bidder shall not change the paragraph numbering identified in Table 3. However, any section, paragraph, or subparagraph in the ADS may be written with additional subparagraphs to enhance readability.

Table 3. Architecture Design Specification Format

(1) ADS HEADING NUMBER	(2) ADS HEADING TITLE	(3) SOW/SYRS REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
Pre Section Pages	Title Page Revision Chart Preface Table of Contents List of Figures List of Tables	Section 6, SOW, Para. 4.1.5	N/A	*No Additional Instructions.*
1	Introduction	Section 6, SOW, Para. 4.1.5, Item 3a	N/A	*No Additional Instructions.*
1.1	Purpose and Scope	Section 6, SOW, Para. 4.1.5, Item 3a	IEEE 12207.1, Para 5.7.1 and Para. 5.7.2 item b	*Explain the purpose and scope of the ADS. The statement of scope shall be consistent with similar statements in the RFP and other relevant system-level or business-level documents.*
1.2	Document Overview	Section 6, SOW, Para. 4.1.5, Item 3a	IEEE 12207.1, Para 6.25.3 item a	*Describe the document structure and what is contained in the document.*
1.3	Referenced Documents	Section 6, SOW, Para. 4.1.5, Item 3a	N/A	*Identify standards and other references on which this document is based, including references that may provide background for the user in understanding the contents of this document.*
2	System Overview	Section 6, SOW, Para. 4.1.5, Item 3b	IEEE 12207.1, Para 6.25.3 item b and Para 6.12.3 item b	*This section should contain a very brief overview of the proposed system, only enough to provide a context for the users to understand the description of the proposed system. Also provide background, methodologies, constraints, or assumptions as applicable.*

(1) ADS HEADING NUMBER	(2) ADS HEADING TITLE	(3) SOW/SYRS REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
3	Architectural Design	Section 6, SOW, Para. 4.1.5, Item 3c	IEEE 12207, Para. 5.3.3.1, IEEE 12207.1, Para 6.25.3 item c,d,e and Para 6.12.3 item c	*Identification of manual operations required by IEEE 12207.1, Para 6.25 is not necessary but may be included if it helps the general system understanding.* *The requirement in Section 6, SOW, Para. 4.1.5, Item 3c, vii to include the hardware and software documentation is not required for the ADS delivered with the proposal but will be required after Contract Award according to the project work plan.*
3.1	CMIPS II Production System	Section 6, SOW, Para. 4.1.5, Item 3c	IEEE 12207, Para. 5.3.3.1, IEEE 12207.1, Para 6.25.3 item c,d,e and Para 6.12.3 item c	*Identify all hardware and software that are part of the CMIPS II production system. Include a graphic representation of the system components, where they reside, and how they interact. For each component, describe its purpose, configuration, its contribution to the system, and security.*
3.2	DDI Phase Development Systems	Section 6, SOW, Para. 4.1.5, Item c	IEEE 12207, Para. 5.3.3.1, IEEE 12207.1, Para 6.25.3 item c,d,e and Para 6.12.3 item c	*Identify all hardware and software that are part of the system to be used in developing the CMIPS II system. Include a graphic representation of the system components, where they reside, and how they interact. For each component, describe its purpose, configuration, its contribution to the system, and security.*
3.3	Maintenance and Operation Phase Development System	Section 6, SOW, Para. 4.1.5, Item 3c	IEEE 12207, Para. 5.3.3.1, IEEE 12207.1, Para 6.25.3 item c,d,e and Para 6.12.3 item c	*Identify all hardware and software that are part of the system to be used for developing fixes and enhancements during the M&O phase. Indicate what parts of the DDI phase development system will be carried over for use during M&O. Include a graphic representation of the system components, where they reside, and how they interact. For each component, describe its purpose, configuration, its contribution to the system, and security.*

(1) ADS HEADING NUMBER	(2) ADS HEADING TITLE	(3) SOW/SYRS REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
4	Top-Level Database Design	Section 6, SOW, Para. 4.1.5, Item 3d	IEEE 12207, Paragraph 5.3.5.3	*Describe the conceptual design for the database. Include a top-level graphic representation of the database components and brief description.*
5	Concept of Execution	Section 6, SOW, Para. 4.1.5, Item 3e	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Provide an introduction to the concept of execution section.*
5.1	Automated Time and Attendance	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 7.11*	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Provide an introduction to the Automated Time and Attendance function.*
5.1.1	Automated Time and Attendance Architecture	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 7.11*	IEEE 12207, Para. 5.3.3.1 and 5.3.5.1	*Identify all hardware and software that are part of the system to be used for the function in Section 6, SyRS, Paragraph 7.11, Automated Timesheet Entry Architecture. Include a graphic representation of the system components, where they reside, and how they interact.*
5.1.2	Automated Time and Attendance Concept of Execution	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 7.11*	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Describe how the system architecture will support the Automated Time and Attendance architecture proposed by the Bidder as defined in Section 6, SyRS, Paragraph 7.11, Automated Timesheet Entry Architecture*
5.2	Forms	Section 6, SOW, Para. 4.1.5, Item 3e	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Provide an introduction to the Forms function.*
5.2.1	Forms Architecture	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 7.8*	IEEE 12207, Para. 5.3.3.1 and 5.3.5.1	*Identify all hardware and software that are part of the system to be used for the function in Section 6, SyRS, Paragraph 7.8, Forms Architecture. Include a graphic representation of the system components, where they reside, and how they interact.*

(1) ADS HEADING NUMBER	(2) ADS HEADING TITLE	(3) SOW/SyRS REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
5.2.2	Forms Concept of Execution	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 7.8*	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Describe how the system architecture will support the forms architecture proposed by the Bidder as defined in Section 6, SyRS, Paragraph 7.8, Forms Architecture.*
5.3	Reports	Section 6, SOW, Para. 4.1.5, Item 3e	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Provide an introduction to the Reports function.*
5.3.1	Reports Architecture	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 7.10*	IEEE 12207, Para. 5.3.3.1 and 5.3.5.1	*Identify all hardware and software that are part of the system to be used for the function in Section 6, SyRS, Paragraph 7.10, Reporting Architecture. Include a graphic representation of the system components, where they reside, and how they interact.*
5.3.2	Reports Concept of Execution	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 7.10*	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Describe how the system architecture will support the Reports architecture proposed by the Bidder as defined in Section 6, SyRS, Paragraph 7.10, Reporting Architecture.*
5.4	User Interface	Section 6, SOW, Para. 4.1.5, Item 3e	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Provide an introduction to the User Interface function.*
5.4.1	User Interface Architecture	Section 6, SOW, Para. 4.1.5, Item 3e and *SyRS, Paragraph 7.5*	IEEE 12207, Para. 5.3.3.1 and 5.3.5.1	*Identify all hardware and software that are part of the system to be used for the function in Section 6, SyRS, Paragraph 7.5, User Interface. Include a graphic representation of the system components, where they reside, and how they interact. Define detailed workstation configuration and specifications for each CMIPS II workstation and how each one relates to the overall CMIPS II system defined in Section 6, SyRS, Paragraph 7.2.1, Workstation Configuration.*

(1) ADS HEADING NUMBER	(2) ADS HEADING TITLE	(3) SOW/SyRS REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
5.4.2	User Interface Concept of Execution	Section 6, SOW, Para. 4.1.5, Item 3e and *SyRS, Paragraph 7.5*	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Describe how the relevant components will support the user interface requirements as defined in Section 6, SyRS, Paragraph 7.5, User Interface.*
5.5	External Interface	Section 6, SOW, Para. 4.1.5, Item 3e	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Provide an introduction to the External Interface function.*
5.5.1	External Interface Architecture	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 7.9*	IEEE 12207, Para. 5.3.3.1 and 5.3.5.1	*Identify all hardware and software that are part of the system to be used for the function in Section 6, SyRS, Paragraph 7.9, External Interface Architecture. Include a graphic representation of the system components, where they reside, and how they interact*
5.5.2	External Interface Concept of Execution	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 7.9*	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Describe how the system architecture will support the External Interface architecture as defined in Section 6, SyRS, Paragraph 7.9, External Interface Architecture.*
5.6	Data Distribution Security	Section 6, SOW, Para. 4.1.5, Item 3e	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Provide an introduction to the Data Distribution Security function.*
5.6.1	Data Distribution Security Architecture	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 8.1.5*	IEEE 12207, Para. 5.3.3.1 and 5.3.5.1	*Identify all hardware and software that are part of the system to be used for the function in Section 6, SyRS, Paragraph 8.1.5, Data Distribution Security. Include a graphic representation of the system components, where they reside, and how they interact*
5.6.2	Data Distribution Security Concept of Execution	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 8.1.5*	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Describe how the system architecture will support the Data Distribution Security requirements as defined in Section 6, SyRS, Paragraph 8.1.5, Data Distribution Security.*

(1) ADS HEADING NUMBER	(2) ADS HEADING TITLE	(3) SOW/SyRS REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
5.7	System Performance	Section 6, SOW, Para. 4.1.5, Item 3e	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Provide an introduction to the System Performance.*
5.7.1	System Performance Architecture	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 9*	IEEE 12207, Para. 5.3.3.1 and 5.3.5.1	*Identify all hardware and software that are part of the system to be used to support and monitor requirements for Section 6, SyRS, Paragraph 9, System Performance. Include a graphic representation of the system components, where they reside, and how they interact*
5.7.2	System Performance Concept of Execution	Section 6, SOW, Para. 4.1.5, Item 3e and *Section 6, SyRS, Paragraph 9*	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Describe how the system architecture will support the System Performance requirements as defined in Section 6, SyRS, Paragraph 9, System Performance*
5.8	System Administration	Section 6, SOW, Para. 4.1.5, Item 3e	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Provide an introduction to the System Administration function.*
5.8.1	System Administration Architecture	Section 6, SOW, Para. 4.1.5, Item 3e and Section 6, SyRS, Para. 8	IEEE 12207, Para. 5.3.3.1 and 5.3.5.1	*Identify all hardware and software that are part of the system to be used to support and monitor requirements for Section 6, SyRS, Paragraph 8, System Administration. Include a graphic representation of the system components, where they reside, and how they interact*
5.8.2	System Administration Concept of Execution	Section 6, SOW, Para. 4.1.5, Item 3e and Section 6, SyRS, Para. 8	IEEE 12207.1, Paragraph 6.25.3 item f and 6.12.3 item c.4	*Describe how the architecture supports the system administration requirements as defined in Section 6, SyRS, Paragraph 8, System Administration*
5.9	Printer Specification	Section 6, SOW, Para. 4.1.5, Item 3f	IEEE 12207, Para. 5.3.3.1 and 5.3.5.1	*Define a detailed printer configuration and specifications for each CMIPS II printer and how each one relates to the overall CMIPS II system as defined in Section 6, SyRS and how the proposal specification will meet the requirements of Section 6, SyRS, Paragraph 7.2.4, Printers.*

(1) ADS HEADING NUMBER	(2) ADS HEADING TITLE	(3) SOW/SYRS REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
6	Requirements Allocation Matrix	Section 6, SOW, Para. 4.1.5, Item 3g	IEEE 12207, Para. 5.3.3.1 and 5.3.5.1	*Trace functional requirements in Section 6, SyRS to the one or more system architecture components that will implement the requirement.*

6.1.6.2 Tab 6.2 – Concept of Operations Scenarios

The Bidder shall present a Concept of Operations as defined in Section 6, SOW, Paragraph 4.1.3, Concept of Operations Scenarios and in compliance with the format defined in Table 4. Concept of Operations Format. The Concept of Operations defines the Bidder's vision for the operation of CMIPS II and the Bidder's ability to communicate that vision to the users.

Preparation Instructions

1. The Concept of Operations shall include a title page.
2. The Concept of Operations shall contain a table of contents providing the number, title, and page number of each titled paragraph, figure, table, and appendix.
3. The Concept of Operations shall provide page numbering/labeling. Each page shall contain a unique page number and display the document number and second level paragraph number, including version, volume, and date, as applicable.

Content Requirements

1. The Bidder shall develop, and deliver, a Concept of Operations, that meets the requirements of Section 6, SOW, Paragraph 4.1.3, Concept of Operations Scenarios.
2. The Bidder shall use the outline and heading numbers shown in columns 1 and 2 of the Table 4 Concept of Operations Format.
3. The Bidder shall describe how they will meet the requirements stated in the paragraph and any subparagraphs from the associated reference in Section 6, SOW, as indicated by the "SOW Reference" in column 3 of Table 4. The Bidder shall also describe how they will meet the referenced standards as described and tailored in columns 4 and 5 of Table 4.
4. The Bidder shall not change the paragraph numbering in Table 4. However, any section, paragraph, or subparagraph in this Concept of Operations may be written with additional subparagraphs to enhance readability.
5. The Concept of Operations shall contain one or more context diagrams. Each context diagram, if appropriate, shall show how non-users, such as recipients and providers, will be affected by CMIPS II.

Table 4. Concept of Operations Format

(1) CO HEADING NUMBER	(2) CO HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
Pre Section Pages	Title Page Revision Chart Table of Contents List of Figures List of Tables	Section 6, SOW, Para. 4.1.3	IEEE 1362, Figure 1	*These items should be presented in a consistent format with other plans and documents the Bidder is submitting with the proposal. The Concept of Operations document must comply with Section 6, SOW, Paragraph 4.1.3, Concept of Operations Scenarios and with the relevant sections of IEEE 1362-1998.*
1	Purpose and Scope	Section 6, SOW, Para. 4.1.3	IEEE 1362, Para. 4.1	*No Additional Instructions.*
1.1	Document Overview	Section 6, SOW, Para. 4.1.3	IEEE 1362, Para. 4.1.2	*The statement of scope shall be consistent with similar statements in the RFP and other relevant system-level or business-level documents.*
1.2	Referenced Documents	Section 6, SOW, Para. 4.1.3	IEEE 1362, Para. 4.2	*No Additional Instructions.*
2	System Overview	Section 6, SOW, Para. 4.1.3	IEEE 1362, Para. 4.1.3	*It is **not** necessary to include the project sponsors, user agencies, development organizations support agencies, certifiers or certifying bodies defined in IEEE 1362, paragraph 4.1.3.*
3	Concepts for the Proposed System	Section 6, SOW, Para. 4.1.3	IEEE 1362, Para. 4.5	*Provide a high level description of how CMIPS II will function for case management, payroll, provider management, program management, forms generation, and reporting.* *Do not include paragraphs for background, operational policies, costs, quality attributes, provisions for safety, or modes of operation defined in IEEE 1362, Para. 4.5.*
4	Operational Scenarios	Section 6, SOW, Para. 4.1.3	IEEE 1362, Para. 4.6	Include the eight scenarios in Section 6, SOW, Paragraph. 4.1.3, Concept of Operations Scenarios and cover the complete range of CMIPS II operations. Include high-level diagrams illustrating each scenario. The descriptions contained in this section should be able to stand alone such that a user could understand it without reference to any other documentation.

6.1.6.3 Tab 6.3 – Capacity Management Plan

The Bidder shall present a Capacity Management Plan as defined in Section 6, SOW, Paragraph 4.4.3, Capacity Planning and Management and in compliance with the format defined in Table 5. Capacity Management Plan Format. The Capacity Management Plan describes how the Bidder intends to ensure that Service Level Agreements (SLA) and Service Level Requirements (SLR) are maintained so that the user will not experience slowdowns and excessive response times while maintaining economical provision of services.

Preparation Instructions

1. The Capacity Management Plan shall include a title page.
2. The Capacity Management Plan shall contain a table of contents providing the number, title, and page number of each titled paragraph, figure, table, and appendix.
3. The Capacity Management Plan shall provide page numbering/labeling. Each page shall contain a unique page number and display the document number, including version, volume, and date.

Content Requirements

1. The Capacity Management Plan (CMP) shall meet the requirements of Section 6, SOW, Paragraph 4.4.3, Capacity Planning and Management.
2. The Bidder shall use the outline, heading numbers, and titles shown in columns 1 and 2 of Table 5. Capacity Management Plan Format.
3. The Bidder shall describe how they will meet the requirements stated in the associated paragraph and any subparagraphs in Section 6, SOW, as indicated by the "SOW Reference" in column 3 of Table 5. The Bidder shall also describe how they will meet the referenced standards as described and tailored in columns 4 and 5 of Table 5.
4. The Bidder shall not change the paragraph numbering identified in Table 5. However, any section, paragraph, or subparagraph in this CMP may be written with additional subparagraphs to enhance readability.

Table 5. Capacity Management Plan Format

(1) CMP HEADING NUMBER	(2) CMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
Pre Section Pages	Title Page Revision Chart Table of Contents List of Figures List of Tables	N/A	N/A	*No Additional Instructions.*
1	Introduction	Section 6, SOW, Para. 4.4.3	N/A	*No Additional Instructions.*
1.1	Overview	Section 6, SOW, Para. 4.4.3	N/A	*Provide a very brief overview of the Capacity Management approach for the CMIPS II System.*

(1) CMP HEADING NUMBER	(2) CMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
1.2	Document Overview	Section 6, SOW, Para. 4.4.3	N/A	*Provide a very brief overview of what the Capacity Management Plan will cover.*
1.3	References	Section 6, SOW, Para. 4.4.3	N/A	*List all the references used in this plan.*
2	Assumptions	Section 6, SOW, Para. 4.4.3	N/A	*List any mathematical assumptions used in the plan as basis for calculations. Document mathematical assumptions to be used in modeling the system capacity.*
3	Organization	Section 6, SOW, Para. 4.4.3	N/A	*No Additional Instructions.*
3.1	Organizational Structure	Section 6, SOW, Para. 4.4.3	N/A	*Identify the relationship of Capacity Management to the Bidder's project organization and the CMIPS Project Office, Data Center Services, Network Services, and CDSS organizations.*
3.2	Roles and Responsibilities	Section 6, SOW, Para. 4.4.3	N/A	*Clearly identify the roles and responsibilities of the Bidder, Data Center Services, Network Services, CDSS, and counties in monitoring and reporting system performance and capacity management.*
4	Processes and Procedures	Section 6, SOW, Para. 4.4.3	N/A	*No Additional Instructions.*
4.1	Capacity Management	Section 6, SOW, Para. 4.4.3	N/A	*Indicate what processes and activities will be used to carry out Capacity Management.* *Document the approach, methodology and tools to be used for capacity planning.* *Document the approach, methodology and tools for managing the system capacity.* *Describe the system monitoring methods and tools that will be used to monitor traffic levels to detect when capacity is breached or service is degraded.* *Indicate the metrics that will be used to demonstrate that capacity and performance requirements are being met.* *Describe the data and the reports that will be produced to support capacity management, including a Capacity Management Report detailing available resources versus utilized resources each quarter.*
4.2	Interface with Change Management	Section 6, SOW, Para. 4.4.3	N/A	*Indicate what inputs Capacity Management will provide to the Change Management process.*

(1) **CMP HEADING NUMBER**	(2) **CMP HEADING TITLE**	(3) **SOW REFERENCE**	(4) **INDUSTRY STANDARD REFERENCE**	(5) **STANDARD TAILORING**
4.3	Interface with DDI Release Management	Section 6, SOW, Para. 4.4.3	N/A	*Indicate what inputs Capacity Management will provide to the Release Management process during the DDI phase.*
4.4	Interface with M&O Release Management	Section 6, SOW, Para. 4.4.3	N/A	*Describe how Capacity Management will contribute to the Release Management process during the M&O phase.*
4.5	Interface with Service Level Management	Section 6, SOW, Para. 4.4.3	N/A	*Not required in this version of the CMP. Under this heading enter "TBD".*
5	Service Level Requirements	Section 6, SOW, Para. 4.4.3	N/A	*Describe the current planned utilization of each CMIPS II hardware component, including but not limited to CPU, Memory, Disk, and network components. Describe how the system will be designed to meet the requirements defined in Section 6, SyRS, Paragraph 9, System Performance.* *Describe the resource requirements for all components of the enterprise architecture including, but not limited to, production servers, HHSDC WAN, local county WANs/LANs, client workstations, and other components required in the solution, as defined in Section 6, SyRS. Include, at a minimum, the following metrics:* 　　*a. The average and peak traffic generated online by a user* 　　*b. The average and peak traffic generated per county for forms traffic.* *Demonstrate how the Bidder's architecture will ensure the required response times to users.* *Describe how the Bidders approach will result in a cost effective solution to meeting capacity requirements.* *Describe how Capacity Management will support system availability.*

(1) CMP HEADING NUMBER	(2) CMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
6	Resource Forecast	Section 6, SOW, Para. 4.4.3	N/A	*Describe the forecast utilization and, where limitations are forecast to be met, or exceeded, detail how capacity will be increased or utilization reduced.* *Account for anticipated load upon complete implementation and increased resource requirements for both user and caseload growth for the next five (5) years of maintenance and operation* *Define how the requirements in Section 6, SyRS, Paragraph 7.1, Central System will be met* *Describe the anticipated upgrade schedule for supporting the needed capacity, for both user and caseload growth, for the next five (5) years.*
7	Risks	Section 6, SOW, Para. 4.4.3	N/A	*Describe the risks that Capacity Management will address and/or will be affected by.*

6.1.7 Tab 7 – Project Management Plans and Documents

The following project management plans and documents must be developed and included in Proposal Volume 1, Tab 7. Where the SOW defines "what" the Bidder services and requirements are for the CMIPS Project, the Project Master Plan (PMP) defines "how" the Bidder accomplishes those services and requirements.

6.1.7.1 Tab 7.1 – Project Master Plan

The Bidder will provide a preliminary Project Master Plan (PMP) that addresses the requirements detailed in Section 6, SOW, Paragraph 3.1.1, Project Master Plan (PMP) and Section 7, DELIVERABLE LIST.

Preparation Instructions

1. The Project Master Plan shall include a title page.
2. The Project Master Plan shall contain a table of contents providing the number, title, and page number of each titled paragraph, figure, table, and appendix.
3. The Project Master Plan shall provide page numbering/labeling. Each page shall contain a unique page number and display the document number, including version, volume, and date.
4. The Project Master Plan shall be prepared in a format using the document organization with the heading numbers and titles identified in columns 1 and 2 of Table 6. Project Master Plan Format.
5. At a minimum, the Project Master Plan shall be prepared using every major heading identified in Table 6 but subheadings may be added as needed to improve the document organization and help the reader's understanding.

Content Requirements

1. The Project Master Plan shall contain the outline and heading numbers shown in Table 6. Project Master Plan Format shall designate the paragraph numbers to be used in the document. The Bidder is not required to submit the supplemental plans required by Section 6, SOW.

2. The Project Master Plan shall describe how it will meet the requirements stated in the paragraph and any subparagraphs in Section 6, SOW, as indicated by the "SOW Reference" in column 3 of Table 6. The Bidder shall also describe how it will meet the referenced standards as described and tailored in columns 4 and 5.

3. There is some section content specified in the following table that is not required for the Bidder proposal submission but will be required in the PMP deliverable after Contract Award. These section headings are included but the content states "TBD." The Project Master Plan shall only contain "TBD" as indicated by the State in the following table. All other sections shall have the content as specified in Paragraph 2 above.

4. The Bidder shall not change the paragraph numbering in the following table. However, any section, paragraph, or subparagraph in this PMP may be written with additional subparagraphs to enhance readability.

5. Throughout the proposal the Bidder shall tailor the IEEE 1058 terminology of "SPMP" to the State terminology of "PMP."

6. The content of each section of the Project Master Plan shall meet the requirements from the RFP and industry standard references identified in columns 4 and 5 with the tailoring guidelines of column 5 of Table 6. Project Master Plan Format.

Table 6. Project Master Plan Format

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
Pre Section Pages	Title Page Revision Chart Table of Contents List of Figures List of Tables	N/A	N/A	
1	OVERVIEW	Section 6, SOW, Para. 3.1.1	IEEE 1058, 4.1 Overview	State the purpose of the PMP.
1.1	PROJECT PURPOSE AND SCOPE	Section 6, SOW, Para. 3.1.1	IEEE 1058, Para. 4.1.1.1 Purpose, scope, and objectives	Follow the instructions in IEEE 1058, Para. 4.1.1.1 Purpose, scope, and objectives. However, *provide just a reference to the official statement of product requirements (SOW and SyRS) in this paragraph.* *Also it is not necessary to define the objectives in this version of the PMP.*

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
1.2	PROJECT ASSUMPTIONS AND CONSTRAINTS	Section 6, SOW, Para. 3.1.1	IEEE 1058, Para. 4.1.1.2 Assumptions and constraints	*No Additional Instructions.*
1.3	PROJECT DELIVERABLES	Section 7, Deliverable List	IEEE 1058, Para. 4.1.1.3 Project deliverables	*Reference the Deliverable List.*
1.4	SCHEDULE AND SUMMARY	Section 6, SOW, Para. 3.1.1	IEEE 1058, Para. 4.1.1.4 Schedule and budget summary	*No Additional Instructions.*
1.5	REFERENCES	Section 6, SOW, Para. 3.1.1	IEEE 1058, Para. 4.2 References	*Follow the instructions in* IEEE *1058, Para 4.2 except as noted in italics below.* Provide a complete list of all documents and other sources of information referenced in the PMP. *The Bidder should not duplicate the State reference list. The Bidder can refer to the State reference list and just provide a list of additional references used by the Bidder.* Any deviations from referenced standards or policies shall be identified and justifications shall be provided.
2	PROJECT ORGANIZATION	Section 6, SOW, Para. 3.2.2	IEEE 1058, Para. 4.4 Project organization	*This information is included in the Project Staffing Plan. Do not repeat the information but provide a reference to the Project Staffing Plan in this section.*
2.1	External Organization	Section 6, SOW, Para. 3.2.2	IEEE 1058, Para. 4.4.1 External interfaces	*This information is included in the Project Staffing Plan. Do not repeat the information but provide a reference to the Project Staffing Plan in this section.*
2.2	Internal Structure	Section 6, SOW, Para. 3.2.2	IEEE 1058, Para. 4.4.2 Internal structure	*This information is included in the Project Staffing Plan. Do not repeat the information but provide a reference to the Project Staffing Plan in this section.*
2.3	Roles and Responsibilities	Section 6, SOW, Para. 3.2.2	IEEE 1058, Para. 4.4.3 Roles and responsibilities , Para. 4.5.2.3 Resource allocation	*This information is included in the Project Staffing Plan. Do not repeat the information but provide a reference to the Project Staffing Plan in this section.*
3	PROJECT MANAGEMENT	Section 6, SOW, Para. 3	IEEE 1058, Para. 4.5 Managerial process plans	Specify the project management processes for the project. This paragraph shall be consistent with Section 6, SOW, Paragraph 3, Project Management.

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
3.1	PROJECT PLANNING	Section 6, SOW, Para. 3.1	IEEE 1058, Para. 4.5 Managerial process plans, and PMBOK 4.3, Develop Project Management Plan	Describe how the Bidder will meet the requirements of Section 6, SOW, Paragraph 3.1, Project Planning and its subparagraphs to prepare the Project Master Plan (PMP), Master Work Plan, Schedule, and Budget Planning.
3.1.1	Project Master Plan (PMP)	Section 6, SOW, Para. 3.1.1	IEEE 1058, Para 4.5	*No additional* instructions.
3.1.2	Master Work Plan	Section 6, SOW, Para. 3.1.2	IEEE 1058, Para. 4.5.2.1 Work activities	Provide a description of the Master Work Plan. Describe the methodologies and tools used to prepare, track, and maintain the Master Work Plan. Identify any constraints or assumptions affecting the activity planning. *For the detailed requirements of the Master Work Plan in IEEE 1058, Para. 4.5.2.1 Work activities, reference the Master Work Plan. In the Master Work Plan, specify the various work activities to be performed in the software project. A work breakdown structure shall be used to depict the work activities and the relationships among work activities. Work activities should be decomposed to a level that exposes all project risk factors and allows accurate estimates of resource requirements and schedule duration for each work activity.* *Work packages are not required in this version of the Master Work Plan.*

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
3.1.3	Schedule	Section 6, SOW, Para. 3.1.3	IEEE 1058, Para. 4.5.2.2 Schedule allocation	*For the general schedule, reference the Master Work Plan. In the Master Work Plan, provide scheduling relationships among work activities in a manner that depicts the time-sequencing constraints and illustrates opportunities for concurrent work activities. Any constraints on scheduling of particular work activities caused by factors external to the project shall be indicated in the work activity schedule. The schedule should include frequent milestones that can be assessed for achievement using objective indicators to assess the scope and quality of work products completed at those milestones. Techniques for depicting schedule relationships shall include milestone charts, activity lists, and critical path Networks (in the Master Work Plan). (Activity networks, PERT, and Gantt charts are optional.)*
3.1.4	Budget Planning	Section 6, SOW, Para. 3.1.4	IEEE 1058, Para. 4.5.2.4 Budget allocation	Provide a general description of the Budget. Describe the methodologies and tools used to plan, track and maintain the budget. Identify any constraints or assumptions affecting the budget planning. *For the detailed budget, reference the budget prepared for the Proposal Cost Proposal. Use instructions in Section 8 of the RFP, not IEEE 1058, Paragraph 4.5.2.4.*
3.2	CONTROL PROCESSES	Section 6, SOW, Para. 3.2	IEEE 1058, Para. 4.5.3 Control plan	*No Additional Instructions.*

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
3.2.1	Schedule and Budget Management	Section 6, SOW, Para. 3.2.1	IEEE 1058, Para. 4.5.3.2 Schedule control plan, 4.5.3.3 Budget control plan	Follow the instruction in IEEE 1058, Para. 4.5.3.2 Schedule control plan and 4.5.3.3 Budget control plan except as italicized below. 4.5.3.2 Schedule control plan shall specify the control mechanisms to be used to measure the progress of work completed at the major and minor project milestones, to compare actual progress to planned progress, and to implement corrective action when actual progress does not conform to planned progress. The schedule control plan shall specify the methods and tools that will be used to measure and control schedule progress. Achievement of schedule milestones should be assessed using objective criteria to measure the scope and quality of work products completed at each milestone. 4.5.3.3 Budget control plan shall specify the control mechanisms to be used to measure the cost of work completed, compare planned cost to budgeted cost, and implement corrective action when actual cost does not conform to budgeted cost. The budget control plan shall specify the intervals at which cost reporting will be done and the methods and tools that will be used to manage the budget. The budget plan should include frequent milestones that can be assessed for achievement using objective indicators to assess the scope and quality of work products completed at those milestones. *Earned value tracking* shall be used to report the budget and schedule plan, schedule progress, and the cost of work completed.
3.2.2	Staffing Management	Section 6, SOW, Para. 3.2.2	PMBOK, Chapter 9 Project Human Resource Management, Paragraph 9.1, Human Resource Planning	The PMP shall provide an overview of Staffing Management and reference the detailed planning in the Project Staffing Plan. In accordance with guidelines from PMBOK, Chapter 9, Section 9.1 Human Resource Planning determines roles, responsibilities and reporting relationships, and creates the staffing management plan.

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
3.2.3	Deliverable Standards and Acceptance Process	Section 6, SOW, Para. 3.2.3	IEEE 1058, Para. 4.6.4 Product acceptance	*Not required in this version of the PMP. Under this heading enter "TBD."*
3.2.4	Issue Management	Section 6, SOW, Para. 3.2.4	IEEE 1058, Para. 4.7.6 Problem resolution plan	Follow the instructions in IEEE 1058, Para. 4.7.6 Problem resolution plan except as noted in italics below. This section of the *PMP* shall specify the resources, methods, tools, techniques, and procedures to be used in reporting, analyzing, prioritizing, and processing *project issues* generated during the project. The *issue management* plan should indicate the roles of development, configuration management, the *Project* change *management* board, and verification and validation in problem resolution work activities. Effort devoted to problem reporting, analysis, and resolution should be separately reported so that rework can be tracked and process improvement accomplished.

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
3.2.5	Change Management	Section 6, SOW, Para. 3.2.5	PMBOK, 5.5 Scope Control; IEEE 1058, Para. 4.5.3.1 Requirements control plan	Follow the instructions in IEEE 1058, Para. 4.5.3.1 Requirements control plan except as noted in italics below. 4.5.3.1 Requirements control plan shall specify the control mechanisms for measuring, reporting, and controlling changes to the *project and* product requirements. This section shall also specify the mechanisms to be used in assessing the impact of requirements changes on product scope and quality, and the impacts of requirements changes on project schedule, budget, resources, and risk factors. *Change management* and Configuration management mechanisms shall include change control procedures with a *Project Change Management Board (PCMB) and Configuration Control Board (CCB).* Techniques that may be used for requirements control include traceability, prototyping and modeling, impact analysis, and reviews. Following guidelines in PMBOK 5.5, Scope control assures all requested changes and recommended corrective actions are processed through the project Integrated Change Control process.

(1) **PMP HEADING NUMBER**	(2) **PMP HEADING TITLE**	(3) **SOW REFERENCE**	(4) **INDUSTRY STANDARD REFERENCE**	(5) **STANDARD TAILORING**
3.2.6	Configuration Management	Section 6, SOW, Para. 3.2.6	IEEE 1058, Para. 4.7.1 Configuration management plan	Follow the instructions in IEEE 1058, Para. 4.7.1 Configuration management plan except as noted in italics below. 4.7.1 Configuration management plan shall contain the configuration management plan for the *system and* software project, to include the methods that will be used to provide configuration identification, control, status accounting, evaluation, and release management. In addition, this section shall specify the processes of configuration management to include procedures for initial baselining of work products, logging and analysis of change requests, change control board procedures, tracking of changes in progress, and procedures for notifying concerned parties when baselines are first established or later changed. The configuration management process should be supported by one or more automated configuration management tools.
3.2.7	Risk Management	Section 6, SOW, Para. 3.2.7	IEEE 1058, Para. 4.5.4 Risk management plan	Follow the instructions in IEEE 1058, Para. 4.5.4 Risk management plan except as noted in italics below. The risk management plan shall also specify plans for assessing initial risk factors and the ongoing identification, assessment, and mitigation of risk factors throughout the life cycle of the project. This plan should describe risk management work activities, procedures and schedules for performing those activities, documentation and reporting requirements, organizations and personnel responsible for performing specific activities, and procedures for communicating risks and risk status among the various *State, Bidder*, and subcontractor organizations. Risk factors that should be considered include risks in the *State*-supplier relationship, contractual risks, technological risks, risks caused by the size and complexity of the product, risks in the development and target environments, risks in personnel acquisition, skill levels and retention, risks to schedule and budget, and risks in achieving *State* acceptance of the product.

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
3.2.8	Project Metrics	Section 6, SOW, Para. 3.2.8	IEEE 1058, Para. 4.5.3.5 Reporting plan	*No Additional Instructions.*
3.2.9	Corrective Action Plan (CAP)	Section 6, SOW, Para. 3.2.9	N/A	*Not required in this version of the PMP. Under this heading enter "TBD."*
3.3	PROJECT INITIATION	Section 6, SOW, Para. 3.3	IEEE 1058, Para. 4.5.1 Project start-up plan	Describe the high-level project initiation process. *It is not necessary to have a separate Project Start Up plan as defined in IEEE 1058, Para. 4.5.1. For IEEE 1058, Para 4.5.1.2 Staffing plan, refer to Project Staffing Plan.* *For IEEE 1058, Para 4.5.1.4 Project staff training plan. Not required in this version of the PMP.*
3.4	PROJECT CLOSEOUT	Section 6, SOW, Para. 3.4	IEEE 1058, Para. 4.5.5 Project closeout plan	*The staff reassignment plan is not required in this version of the PMP. Under this heading enter "TBD."*
4	TECHNICAL PROCESSES	Section 6, SOW, Para. 4	IEEE 1058, Para. 4.6 Technical Process Plans	*No additional instructions.*
4.1	SYSTEM DEVELOPMENT	Section 6, SOW, Para. 4.1	IEEE 12207, Para. 5.3 Development process	Follow the instructions in IEEE 12207, Para. 5.3 Development process except as noted in italics below. The Development Process contains the activities and tasks of the developer. The process contains the activities for requirements analysis, design, coding, integration, testing, installation and acceptance related to software products. It *shall* contain system related activities *as* stipulated in the Contract. The developer performs or supports the activities in this process in accordance with the Contract.

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
4.1.1	System Development Planning	Section 6, SOW, Para. 4.1.1	IEEE 12207, Para. 5.3 Development process	Follow the instructions in IEEE 12207, Para 5.3.1.4 except as noted in italics below. The developer shall develop plans for conducting the activities of the development process. The plans *shall* include specific standards, methods, tools, actions, and responsibility associated with the development and qualification of all requirements including safety and security. If necessary, separate plans may be developed. These plans shall be documented and executed.
4.1.2	System Requirements Validation	Section 6, SOW, Para. 4.1.2	IEEE 12207, Para. 5.3.2 System requirements analysis	Follow the instructions in IEEE 12207, Para. 5.3.2 System requirements analysis *except it is not necessary to address the human-factors engineering ergonomics in this PMP.*
4.1.3	Concept of Operations Scenarios	Section 6, SOW, Para. 4.1.3	IEEE 1362, Concept of Operations (ConOps) Document	*Identify the purpose and scope of the concept of operations. Reference the Concept of Operations included in the proposal.*
4.1.4	General System Design (GSD)	Section 6, SOW, Para. 4.1.4	IEEE 12207, Para. 5.3.3 System architecture design; Para. 5.3.5 Software architecture design	Follow the instructions in IEEE 12207, Para. 5.3.3 System architecture design; Para. 5.3.5 Software architecture design except it is not necessary to address the following in this section: *5.3.5.4 The developer shall develop and document preliminary versions of user documentation.* *5.3.5.5 The developer shall define and document preliminary test requirements and the schedule for Software Integration.*
4.1.5	Detailed System Design (DSD)	Section 6, SOW, Para. 4.1.6	IEEE 12207, Para. 5.3.6 Software detailed design	Follow the instructions in IEEE 12207, Para. 5.3.6 Software detailed design except it is not necessary to address the following in this section: *5.3.6.4 The developer shall update user documentation as necessary.* *5.3.6.5 The developer shall define and document test requirements and schedule for testing software units. The test requirements should include stressing the software unit at the limits of its requirements.*

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
4.1.6	Coding and Documentation	Section 6, SOW, Para. 4.1.7	IEEE 12207, Para. 5.3.7 Software coding and testing.	*No Additional Instructions.*
4.1.7	Development Reporting and Metrics	Section 6, SOW, Para. 4.1.8	IEEE 12207	*No additional instructions.*
4.2	SYSTEM TEST AND EVALUATION	Section 6, SOW, Para. 4.2	IEEE 12207	*No additional instructions.*
4.2.1	Test Planning and Deliverables	Section 6, SOW, Para. 4.2.1	IEEE 829-1983, Standard for Software Test Documentation; IEEE 12207.1, Para. 6.27, Test or Validation Plan	*No Additional Instructions.*
4.2.2	Software Unit and Component Testing	Section 6, SOW, Para. 4.2.2	IEEE 12207	*No additional instructions.*
4.2.3	Integration Testing	Section 6, SOW, Para. 4.2.3	IEEE 12207	*No additional instructions.*
4.2.4	System Qualification Testing	Section 6, SOW, Para. 4.2.4	IEEE 12207, Para. 5.3.9 Software qualification testing	*No Additional Instructions.*
4.2.5	Release Readiness Review	Section 6, SOW, Para. 4.2.5	IEEE 12207	*No additional instructions.*
4.2.6	System Test and Evaluation Reporting and Metrics	Section 6, SOW, Para. 4.2.6	IEEE 12207	*No additional instructions.*
4.3	SYSTEM MAINTENANCE AND ENHANCEMENTS	Section 6, SOW, Para. 4.3	IEEE 12207, Para. 5.5 Maintenance process	*No Additional Instructions.*
4.3.1	System Maintenance and Enhancement Overview	Section 6, SOW, Para. 4.3.1	IEEE 12207	*No additional instructions.*

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
4.3.2	Project Maintenance Planning	Section 6, SOW, Para. 4.3.2	IEEE 12207, Para. 5.5.1 Process implementation	*Follow IEEE 12207; Para. 5.5.1 Process implementation except the "Problem resolution Process" shall be tailored to the State's "Issue Resolution Process."*
4.3.3	Modification Management	Section 6, SOW, Para. 4.3.3	IEEE 12207, Para. 5.5.2 Problem and modification analysis	*No Additional Instructions.*
4.3.4	Defect Corrections	Section 6, SOW, Para. 4.3.4	IEEE 12207	*No additional instructions.*
4.3.5	Release Management	Section 6, SOW, Para. 4.3.5	IEEE 12207, Para. 5.5.3 Modification implementation	*No Additional Instructions.*
4.4	SYSTEM OPERATIONS ADMINISTRATION	Section 6, SOW, Para. 4.4		*No additional instructions.*
4.4.1	System Operation Planning	Section 6, SOW, Para. 4.4.1	IEEE 12207, Para. 5.4.1 Process implementation	*5.5.1.2 The "Problem resolution Process" shall be tailored to the State's "Issue Resolution Process."*
4.4.2	Data Distribution	Section 6, SOW, Para. 4.4.2	N/A	*No additional instructions.*
4.4.3	Capacity Planning and Management	Section 6, SOW, Para. 4.4.3	N/A	*Reference the Capacity Management Plan.*
4.4.4	Operations Management	Section 6, SOW, Para. 4.4.4	N/A	*No additional instructions.*
4.4.5	System Security	Section 6, SOW, Para. 4.4.5	N/A	*No additional instructions.*
4.4.6	Backup and Recovery	Section 6, SOW, Para. 4.4.6	N/A	*No additional instructions.*
4.4.7	Data Archive	Section 6, SOW, Para. 4.4.7	N/A	*No additional instructions.*
4.4.8	Disaster Recovery	Section 6, SOW, Para. 4.4.8	N/A	*No additional instructions.*

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
4.4.9	Customer Service/Help Desk	Section 6, SOW, Para. 4.4.9	N/A	*No additional instructions*
4.4.10	System Administration Reporting and Metrics	Section 6, SOW, Para. 4.4.10	N/A	*No additional instructions.*
4.5	STATEWIDE IMPLEMENTATION	Section 6, SOW, Para. 4.5	N/A	*No additional instructions.*
4.5.1	Implementation Roles and Responsibilities	Section 6, SOW, Para. 4.5.1	N/A	*No additional instructions.*
4.5.2	Statewide Implementation Planning	Section 6, SOW, Para. 4.5.2	N/A	*No additional instructions.*
4.5.3	Business Change Management	Section 6, SOW, Para. 4.5.3	N/A	*No additional instructions.*
4.5.4	System Deployment Preparation	Section 6, SOW, Para. 4.5.4	N/A	*No additional instructions.*
4.5.4.1	Data Cleanup	Section 6, SOW, Para. 4.5.4.1	N/A	*No additional instructions.*
4.5.4.2	Data Conversion	Section 6, SOW, Para. 4.5.4.2	N/A	*No additional instructions.*
4.5.4.3	Site Preparation	Section 6, SOW, Para. 4.5.4.3	N/A	*This PMP does not include preparation for administrative personnel, and janitorial services.*
4.5.4.4	Training	Section 6, SOW, Para. 4.5.4.4	N/A	*No additional instructions.*
4.5.5	Release Installation	Section 6, SOW, Para. 4.5.5	N/A	*No additional instructions.*
4.5.6	Pilot Operation	Section 6, SOW, Para. 4.5.6	N/A	*No additional instructions.*

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
4.5.7	County Deployment	Section 6, SOW, Para. 4.5.7	N/A	*No additional instructions.*
4.5.8	CDSS Deployment	Section 6, SOW, Para. 4.5.8	N/A	*No additional instructions.*
4.5.9	Business Services Migration	Section 6, SOW, Para. 4.5.9	N/A	*No additional instructions.*
4.5.10	Implementation Reviews	Section 6, SOW, Para. 4.5.10	N/A	*No additional instructions.*
4.5.11	Implementation Reporting and Metrics	Section 6, SOW, Para. 4.5.11	N/A	*No additional instructions.*
4.6	PROGRAM SUPPORT	Section 6, SOW, Para. 4.6	N/A	*No additional instructions.*
4.6.1	Program Support Planning	Section 6, SOW, Para. 4.6.1	N/A	*No additional instructions.*
4.6.2	Case Management Services	Section 6, SOW, Para. 4.6.2	N/A	*No additional instructions.*
4.6.3	Payroll Processing Services	Section 6, SOW, Para. 4.6.3	N/A	*No additional instructions.*
4.6.3.1	Daily Processing	Section 6, SOW, Para. 4.6.3.1	N/A	*No additional instructions.*
4.6.3.2	Taxes	Section 6, SOW, Para. 4.6.3.2	N/A	*No additional instructions.*
4.6.3.3	W2	Section 6, SOW, Para. 4.6.3.3	N/A	*No additional instructions.*
4.6.3.4	Withholding Management	Section 6, SOW, Para. 4.6.3.4	N/A	*No additional instructions.*

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
4.6.3.5	Liens	Section 6, SOW, Para. 4.6.3.5	N/A	*No additional instructions.*
4.6.3.6	Warrant Problem Management	Section 6, SOW, Para. 4.6.3.6	N/A	*No additional instructions.*
4.6.3.7	Timesheet Processing	Section 6, SOW, Para. 4.6.3.7	N/A	*No additional instructions.*
4.6.4	Program Integrity Services	Section 6, SOW, Para. 4.6.4	N/A	*No additional instructions.*
4.6.5	Funding Source Management	Section 6, SOW, Para. 4.6.5	N/A	*No additional instructions.*
4.6.6	Website Management	Section 6, SOW, Para. 4.6.6	N/A	*No additional instructions.*
4.6.7	Forms Support	Section 6, SOW, Para. 4.6.7	N/A	*No additional instructions.*
4.6.8	Reporting Support	Section 6, SOW, Para. 4.6.8	N/A	*No additional instructions.*
4.6.9	Project Service Requests	Section 6, SOW, Para. 4.6.9	N/A	*No additional instructions.*
4.6.10	CDSS APB Infrastructure Support	Section 6, SOW, Para. 4.6.10	N/A	*Not required in this version of the PMP. Under this heading enter "TBD."*
4.6.11	Legal Impact Analysis Services	Section 6, SOW, Para. 4.6.11	N/A	*Not required in this version of the PMP. Under this heading enter "TBD."*
4.6.12	Program Support Reporting and Metrics	Section 6, SOW, Para. 4.6.12	N/A	*No additional instructions.*
5	SUPPORTING PROCESSES	Section 6, SOW, Para. 5	IEEE 12207, Para. 6 Supporting Processes	*No additional instructions.*

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
5.1	COMMUNICATION	Section 6, SOW, Para. 5.1	PMBOK 10.1, Communications Planning	*It is not necessary to identify and describe each stakeholder and/or form of communication in this version of the PMP. This will be accomplished in the Communications Plan to be delivered after Contract Award.* *Under this heading enter "TBD."*
5.2	DOCUMENTATION MANAGEMENT	Section 6, SOW, Para. 5.2	IEEE 1058, Para. 4.7.3 Documentation plan; IEEE 12207, Para. 6.1 Documentation Process	*Not required in this version of the PMP. Under this heading enter "TBD."*
5.3	QUALITY MANAGEMENT	Section 6, SOW, Para. 5.3	IEEE 1058, Para. 4.7.4 Quality assurance plan	*No additional instructions.*
5.3.1	Product Assurance	Section 6, SOW, Para. 5.3.1	IEEE 1058, Para. 4.5.3.4 Quality control plan	Follow IEEE 1058 Para 4.5.3.4 Quality control plan except as noted in italics below. Quality control plan shall specify the mechanisms to be used to measure and control the quality of *work products*. Quality control mechanisms may include quality assurance of work processes, verification and validation, joint reviews, audits, and process assessment.

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
5.3.2	Verification and Validation	Section 6, SOW, Para. 5.3.2	IEEE 1058, Para. 4.7.2 Verification and validation plan	Follow IEEE 1058 Para 4.7.2 Verification and validation plan except as noted in italics below. This section of the *PMP* shall contain the verification and validation plan for the project to include scope, tools, techniques, and responsibilities for the verification and validation work activities. The organizational relationships and degrees of independence between development activities and verification and validation activities shall be specified. Verification planning *shall* result in specification of techniques such as traceability, milestone reviews, progress reviews, peer reviews, prototyping, simulation, and modeling. Validation planning *shall* result in specification of techniques such as testing, demonstration, analysis, and inspection. Automated tools to be used in verification and validation *shall* be specified.
5.3.3	Process Assurance	Section 6, SOW, Para. 5.3.3	IEEE 1058, Para. 4.5.3.4 Quality control plan	Follow IEEE 1058 Para 4.5.3.4 Quality control plan, except as noted in italics below. This section of the *PMP* shall specify the mechanisms to be used to measure and control the quality of the *work processes*. Quality control mechanisms may include quality assurance of work processes, verification and validation, joint reviews, audits, and process assessment.
5.3.4	Joint Reviews	Section 6, SOW, Para. 5.3.4	IEEE 1058, Para. 4.7.5 Reviews and audits plan	Follow IEEE 1058 Para 4.7.5 Reviews and audits plan except as noted in italics below. This section of the *PMP* shall specify the schedule, resources, and methods and procedures to be used in conducting project reviews and audits. The plan should specify plans for joint *State*-supplier reviews, management progress reviews, developer peer reviews, quality assurance audits, and *State*-conducted reviews and audits. The plan should list the external agencies that approve or regulate any product of the project.

(1) PMP HEADING NUMBER	(2) PMP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
5.3.5	Quality Reporting and Metrics	Section 6, SOW, Para. 5.3.5	N/A	*No additional instructions.*
5.4	SUBCONTRACTOR MANAGEMENT	Section 6, SOW, Para. 5.4	IEEE 1058, Para. 4.7.7 Subcontract management plans	*No additional instructions.*
5.5	PROCESS IMPROVEMENT	Section 6, SOW, Para. 5.5	IEEE 1058, Para. 4.7.8 Process Improvement Plan	*Not required in this version of the PMP. Under this heading enter "TBD."*
5.6	FACILITIES	Section 6, SOW, Para. 5.6	N/A	*Not required in this version of the PMP. Under this heading enter "TBD."*
5.7	HARDWARE AND SOFTWARE	Section 6, SOW, Para. 5.7	N/A	*Not required in this version of the PMP. Under this heading enter "TBD."*

6.1.7.2 Tab 7.2 – Master Work Plan

The Bidder shall provide a Master Work Plan with a high-level Work Breakdown Structure (WBS) that meets the requirements defined in Section 6, SOW, Paragraph 3.1.2, Master Work Plan.

Preparation Instructions

1. The Bidder shall submit a Work Plan. The exact format will depend on the tool used by the Bidder to generate the Work Plan.
2. The document shall include a title page.

Content Requirements

1. The Master Work Plan shall contain the elements defined in Section 6, SOW, Paragraph 3.1.2, Master Work Plan.
2. In the Master Work Plan submitted with the proposal, the Bidder shall plan the entire DDI phase and one year of the M&O phase.
3. The Master Work Plan shall contain details for the near-term and milestones, key tasks, and key deliverables in the far-term. Specifically for the proposal Master Work Plan, the Project Initiation subphase and System Requirements Validation subphase shall be planned in detail such that the total resource unit estimates by skill category do not exceed one hundred sixty (160) staff hours and the total duration of any single work plan activity should not exceed four (4) weeks. For the remainder of the DDI phase and M&O phase, the project shall be planned for milestones, key tasks, and key deliverables such that the duration of activities should not exceed six months.

4. Milestones shall include, at a minimum, the milestones listed in Section 6, SOW, Paragraph 5.3.4.3, Milestone Reviews.

   a. For each county implementation, the milestones shall include the implementation completion for each county in addition to the Post Site Implementation Review to be scheduled one month after the implementation completion.

5. The WBS shall include all key activities in the Section 6, SOW. Table 7 shows an example of a two-tier WBS that includes key SOW activities.

Table 7. Sample Two-tier WBS

NUMBER	WBS ELEMENT
1	PROJECT INITIATION
1.1.	Project Planning
1.2.	Staffing Initiation
1.3.	Equipment Initiation
1.4.	Facilities Initiation
2	SYSTEM DEVELOPMENT
2.1.	System Development Planning
2.2.	System Requirements Validation
2.3.	Concept of Operations Scenarios
2.4.	General System Design (GSD)
2.5.	Detailed System Design (DSD)
2.6.	Coding and Documentation
3	SYSTEM TEST AND EVALUATION
3.1.	Test Planning
3.2.	Software Unit and Component Testing
3.3.	Integration Testing
3.4.	System Qualification Testing
3.5.	Release Readiness Review
4	STATEWIDE IMPLEMENTATION
4.1.	Statewide Implementation Planning
4.2.	Business Change Management
4.3.	Data Cleanup
4.4	Data Conversion
4.5.	Site Preparation
4.6.	Training
4.7.	Release Installation
4.8.	Pilot Operation
4.9.	County Deployment
4.10.	CDSS Deployment
4.11	Business Services Migration

NUMBER	WBS ELEMENT
4.12	Implementation Reviews
5	SYSTEM MAINTENANCE AND ENHANCEMENTS
5.1.	Project Maintenance Planning
5.2.	Modification Management
5.3.	Defect Corrections
5.4.	Release Management
6	SYSTEM ADMINISTRATION
6.1.	System Operation Planning
6.2.	Data Distribution
6.3.	Capacity Planning and Management
6.4.	Operations Management
6.5.	System Security
6.6.	Backup and Recovery
6.7.	Data Archive
6.8.	Disaster Recovery
6.9.	Customer Service/Help Desk
7	PROGRAM SUPPORT
7.1.	Program Support Planning
7.2.	Case Management Services
7.3.	Payroll Processing Services
7.4.	Timesheet Processing
7.5.	Program Integrity Services
7.6.	Funding Source Management
7.7.	Website Management
7.8.	Forms Support
7.9.	Reporting Support
7.10.	Project Service Requests
7.11.	CDSS APB Infrastructure Support
7.12.	Legal Impact Analysis Services
8	CONTROL PROCESSES
8.1.	Schedule and Budget Management
8.2.	Staffing Management
8.3.	Deliverable Standards and Acceptance Process
8.4.	Issue Management
8.5.	Change Management
8.6.	Configuration Management
8.7.	Risk Management

NUMBER	WBS ELEMENT
8.8.	Project Metrics
9	SUPPORTING PROCESSES
9.1	Communication
9.2.	Document Management
9.3.	Quality Management
9.4.	Subcontractor Management
9.5.	Process Improvement
9.6.	Facilities
9.7.	Hardware and Software
10	PROJECT CLOSEOUT

6.1.7.3 Tab 7.3 – Project Staffing Plan (PSP)

The Bidder must present a Project Staffing Plan as addressed in Section 6, SOW, Paragraph 3.2.2.1, Project Staffing Plan, Paragraph 3.2.2.2, Staff Changes and in compliance with the format of Table 8. Project Staffing Plan Format. The purpose of the Project Staffing Plan is to identify the Bidder's staff resources and staffing management methods necessary to meet the needs of the Project.

Preparation Instructions

1. The Project Staffing Plan shall include a project-staffing matrix and an organization chart.

Content Requirements

1. The Bidder must present a Project Staffing Plan (PSP) as defined in Section 6, SOW, Paragraph 3.2.2.1, Project Staffing Plan, and Paragraph 3.2.2.2, Staff Changes.

2. The Bidder shall prepare the PSP with a format using the document organization with the heading numbers and titles identified in columns 1 and 2 of Table 8. Project Staffing Plan Format. At a minimum, the Bidder shall use every major heading identified in Table 8, but may add subheadings as needed to improve the document organization and help the reader's understanding.

3. The content of each section of the PSP shall meet the requirements from the RFP and industry standard references identified in columns 4 and 5 with the tailoring guidelines of column 5 of Table 8. Project Staffing Plan Format.

Table 8. Project Staffing Plan Format

(1) PSP HEADING NUMBER	(2) PSP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
Pre Section Pages	Title Page Revision Chart Table of Contents List of Figures List of Tables	Section 6, SOW, Para. 3.2.2.1	N/A	These items should be presented in a format consistent with other plans and documents the Bidder is submitting with the proposal.

(1) PSP HEADING NUMBER	(2) PSP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
1	Introduction	N/A	N/A	Define the purpose and scope of this document. The statement of scope shall be consistent with similar statements in the RFP and other relevant system-level or business-level documents.
2	Referenced Documents	N/A	N/A	Identify standards and other references on which this document is based, including references that may provide background for the user in understanding the contents of this document.
3	Staff Management	Section 6, SOW, Para. 3.2.2.1	PMBOK Ch. 9.1.3 Human Resource Planning: Outputs, paragraph 3, Staffing Management Plan	In accordance with guidelines from PMBOK, Chapter 9, Section 9.1 Human Resource Planning determines roles, responsibilities and reporting relationships, and creates the staffing management plan. *The Project Staffing Plan delivered to the State does need to address "Recognition and rewards", "Compliance" and "Safety" as described in PMBOK Ch 9.1.3, paragraph 3, Staffing Management Plan. These topics are the vendor responsibility and can be addressed in the internal project plans which are not deliverables.*
3.1	Organization	Section 6, SOW, Para. 3.2.2.1	PMBOK Ch. 9.1.3, Human Resource Planning: Outputs, paragraph 2, Project Organization Charts	In accordance with guidelines from PMBOK 9.1.3, provide a project organizational chart that is a graphic display of the project team members and their reporting relationships. *Include the project team relationship to the CMIPS Project Office and other organizations involved in the project.*
3.2	Training and Knowledge Transfer	Section 6, SOW, Para. 3.2.2.1	PMBOK Ch. 9.1.3, Human Resource Planning: Outputs, paragraph 3, bullet "Training needs"	*Not required in this version of the PSP. Under this heading enter "TBD."* After project initiation, this section will describe how staff will be trained in the domain knowledge necessary to perform their function. Describe how knowledge transfer will take place in the case that a staff member leaves or is moved to a new position.

(1) PSP HEADING NUMBER	(2) PSP HEADING TITLE	(3) SOW REFERENCE	(4) INDUSTRY STANDARD REFERENCE	(5) STANDARD TAILORING
3.3	Staff Replacement Procedures	Section 6, SOW, Para. 3.2.2.2	PMBOK Ch. 9.1.3, Human Resource Planning: Outputs, paragraph 3, bullets "Staff acquisition" and "Release criteria"	Describe how the Bidder will comply with the SOW requirements. Using guidelines from PMBOK Ch 9.1.3, describe the acquisition and release criteria for project staff.
3.4	Staffing Plan Assumptions	Section 6, SOW, Para. 3.2.2.1	N/A	Describe any assumptions that were used to develop the Staffing Plan model.
4	Roles and Responsibilities	Section 6, SOW, Para. 3.2.2	PMBOK Ch. 9.1.3, Human Resource Planning: Outputs, paragraph 1, Roles and Responsibilities	In accordance with guidelines from PMBOK Ch 9.1.3, paragraph 1, Roles and Responsibilities, address the role, authority, responsibility, and competency for each staff role. *The role need only be described once. For example, a role might have one description for a Senior Developer even though the project may require several senior developers. Identify key staff and the backups for key staff.*
5	Staff Qualifications	Section 6, SOW, Para. 3.2.2	PMBOK Ch. 9.1.3, Human Resource Planning: Outputs, paragraph 1, Roles and Responsibilities, bullet "Competency"	*Not required in this version of the PSP. Under this heading enter "TBD."*
6	Resource Allocation	Section 6, SOW, Para. 3.2.2	PMBOK Ch. 9.1.3 , Human Resource Planning: Outputs, paragraph 3, bullet "Timetable"	In accordance with guidelines in PMBOK ch 9.1.3, paragraph 3, bullet "Timetable" *identify the planned month-by-month allocation of staff for the duration of the DDI phase. This section contains a graphic representation of the total number full-time-equivalent staff by month for the DDI phase. Identify the planned annual allocation of staff for the duration of the M&O phase. This section must correspond to the Master Work Plan.*

(1) **PSP HEADING NUMBER**	(2) **PSP HEADING TITLE**	(3) **SOW REFERENCE**	(4) **INDUSTRY STANDARD REFERENCE**	(5) **STANDARD TAILORING**
7	State Staff Interaction	Section 6, SOW, Para. 3.2.2	N/A	*Describe the proposed responsibilities for state staff, including county personnel. For example, define the expected participation of county personnel in the requirements validation process. Describe the working relationship between Bidder's staff and State personnel; for example, who leads, who supports, who coordinates.*

6.1.7.4 Tab 7.4 – Key Staff

The Bidder shall specify the names, submit completed resume summary forms (Exhibit 9-3), resumes and references for the following key project staff in the proposal. Key Staff is defined in Section 6, SOW, Paragraph 3.2.2.3, Key Staff.

1. Contractor Project Manager
2. Contractor Technical Project Manager
3. Contractor Systems Implementation Manager
4. Contractor Test Manager
5. Contractor Training Manager

Resume Summary Forms and Resumes for the remaining key staff members are **not** required for the proposal.

Resume Summary Forms shall be complete in all respects for each specified Key Staff member and shall clearly indicate the <u>project cost, experience, dates of service and tasks performed</u> for positions used to meet the requirements. Resumes for Key Staff shall be in a consistent format.

6.1.7.5 Tab 7.5 – Statement of Work Traceability Matrix

The Bidder shall provide a Statement of Work Traceability Matrix that shows the relationship between Section 6, TECHNICAL REQUIREMENTS – SOW, the Project Master Plan, WBS, and the Project Staffing Plan in a tabular format as shown in Exhibit 9-4, Statement of Work Traceability Matrix.

a. Columns 1 and 2 of the exhibit are the references to the Statement of Work included in the RFP and should not be changed.

b. Column 3 must reference the paragraph number and title in the Bidder's Project Master Plan that corresponds to the SOW requirement for each row.

c. Column 4 must reference the Work Breakdown Structure Number and task title in the Bidder's Master Work Plan that corresponds to the SOW requirement for each row. The WBS reference should match the level of detail in column 1. For example in column 1, paragraph 3.1.4 is a third-tier element in the SOW. In this traceability matrix, the Bidder may reference the third-tier WBS for that element; it is not necessary to list every sub-element to that task even though the Bidder may have additional sub-elements in the Master Work Plan.

d. Column 5 should reference the paragraph number and staff role title in the Bidder's Project Staffing Plan that corresponds to the SOW requirement for each row. If there is more than one staff role for the SOW function in column 2, list all the staff role titles.

6.1.8 Tab 8 – Proposal Exhibits

The following RFP exhibits, including those defined in Section 5, ADMINISTRATIVE REQUIREMENTS, must be addressed (if not applicable, indicate that in your proposal) and included in Proposal Volume 1, Tab 8:

Exhibit 1   Insurance Requirements

Exhibit 2   Disabled Veteran Business Enterprise (DVBE) Participation Program Requirements

Exhibit 3   Certification To Do Business In The State Of California

Exhibit 4   Subcontractors

Exhibit 5   Customer References for Productive Use

Exhibit 6   Small Business Certification, if applicable

Exhibit 7   Local Agency Military Base Recovery Act (LAMBRA), if applicable

Exhibit 8   Target Area Contract Preference Act (TACPA), if applicable

Exhibit 9   Enterprise Zone Act (EZA), if applicable

<u>EXHIBITS FOR THIS VOLUME MUST BE COMPLETE IN EVERY DETAIL EXCEPT FOR COST INFORMATION. DO NOT INCLUDE COST INFORMATION IN THIS VOLUME. COMPLETE A DUPLICATE EXHIBIT WITH THE COMPLETED COST INFORMATION AND SUBMIT WITH VOLUME 3</u>.

6.1.8.1 Exhibit 1   Insurance Requirements

The Bidder must submit proof of a valid Worker's Compensation Insurance Policy as defined in Section 5, ADMINISTRATIVE REQUIREMENTS, Paragraph 2.1, Insurance Requirements.

6.1.8.2 Exhibit 2 Disabled Veteran Business Enterprise (DVBE) Participation Program Requirements

The Bidder must complete the Disabled Veteran Business Enterprise (DVBE) Participation Program Requirements form and submit it as defined in Section 5, ADMINISTRATIVE REQUIREMENTS, Paragraph 3.1, DVBE Participation Program Requirements.

The Bidder shall identify a <u>percentage figure</u> representing the rate of participation rather than an actual <u>dollar figure</u>. This data shall be identified on the DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION SUMMARY form (STD. 840 Revised 4/1/03) in the column marked "CLAIMED DVBE VALUE."

NOTE: THE INFORMATION FOR THE STD 840 Revised 4/1/03 MUST BE COMPLETE IN EVERY DETAIL EXCEPT FOR COST INFORMATION. DO NOT INCLUDE COST INFORMATION IN THIS VOLUME. COMPLETE AN STD 840 Revised 4/1/03 WITH THE COMPLETED COST INFORMATION AND SUBMIT WITH VOLUME 3, COST PROPOSAL.

6.1.8.3 Exhibit 3 Certification To Do Business In The State Of California

The Bidder must submit a certification from the California Secretary of State that the Bidder is qualified to do business in the State of California as defined in Section 5, ADMINISTRATIVE REQUIREMENTS, Paragraph 3.2, Certification To Do Business In The State Of California.

6.1.8.4 Exhibit 4 Subcontractors

The Bidder must complete and submit Section 5, ADMINISTRATIVE REQUIREMENTS, Exhibit 5-1 Subcontractors, whether or not subcontractors will be used as defined in Section 5, Paragraph 3.4, Subcontractors. Additionally, if Subcontractors are being used, the Bidder shall provide all information required in Section 5, Paragraph 3.4, Subcontractors.

6.1.8.5 Exhibit 5 Customer References for Productive Use

The Bidder must provide a list of customers who presently have the proposal equipment and software installed and operating as defined in Section 5, ADMINISTRATIVE REQUIREMENTS, Paragraph 3.5.1, Customer References for Productive Use.

6.1.8.6 Exhibit 6 Small Business Certification

Bidders desiring to claim the Small Business Preference must submit Section 5, ADMINISTRATIVE REQUIREMENTS, Exhibit 5-2 Preferences Claimed, and all required documentation as defined in Section 5, Paragraph 4.1, Small Business Preference.

6.1.8.7 Exhibit 7 Local Agency Military Base Recovery Act (LAMBRA)

Bidders desiring to claim the LAMBRA preference must submit a fully completed copy of the Standard Form 832, as defined in Section 5, ADMINISTRATIVE REQUIREMENTS, Paragraph 4.2, Local Agency Military Base Recovery Act (LAMBRA).

6.1.8.8 Exhibit 8 Target Area Contract Preference Act (TACPA)

Bidders desiring to claim the TACPA preference must submit a fully completed copy of the Standard Form 830, as defined in Section 5, ADMINISTRATIVE REQUIREMENTS, Paragraph 4.3, Target Area Contract Preference Act (TACPA).

6.1.8.9 Exhibit 9 Enterprise Zone Act (EZA)

Bidders desiring to claim the EZA preference must submit a fully completed copy of the Standard Form 831S as defined in Section 5, ADMINISTRATIVE REQUIREMENTS, Paragraph 4.4, Enterprise Zone Act (EZA).

6.2   Volume 2 – Contract

The Bidder must submit the Contract language in this Volume. The Bidder shall include Title Pages for Exhibits 1 through 9 in Volume 2 (See Section 11, CONTRACT.) In Volume 2, the Bidder shall include the content for Exhibit 3, Deliverables and Milestones; Exhibit 6, Performance Bond or Letter of Credit; Exhibit 7, Federal Assurances, and Exhibit 9, Glossary and Acronyms. The content for the Exhibit 1, Statement of Work, shall not be included in Volume 2 because it is redundant to the Statement of Work Response in Volume 1, Tab 4. The content for the Exhibit 2, System Requirements, shall not be included in Volume 2 because it is redundant to the System Requirements Response in Volume 1, Tab 3. The content for the Exhibit 4, Rates and Pricing, shall not be included in Volume 2 because it is redundant to the Volume 3,

Cost Proposal. The content for the Exhibit 5, Certifications, shall not be included in Volume 2 because it is redundant to the certifications submitted in the Volume 1 Exhibits. The content for the Exhibit 8, Vendor's Proposal, shall not be included in Volume 2 because it is redundant to Volume 1, Response to Requirements.

The Standard Form 213 must be signed by an individual authorized to bind the firm as specified in Section 2, RULES GOVERNING COMPETITION, Paragraph 3.9.5, Signature of Proposal. The Final Proposal must contain an original signature on the submitted Form 213. Do not fill in the effective dates or costs. **Deviation from terms and conditions for this RFP may be cause for rejection of your proposal.**

NOTE: THE INFORMATION FOR THE CONTRACT MUST BE COMPLETE IN EVERY DETAIL EXCEPT FOR COST INFORMATION. DO NOT INCLUDE COST INFORMATION IN THIS VOLUME.

6.3 Volume 3 – Cost Proposal

The Cost Proposal must be separately sealed and clearly labeled: "Volume 3, Cost Proposal for RFP HHSDC 4130-141A". The sealed Volume 3 must contain all completed cost sheets, schedules, Contract Exhibits and Attachments with identified costs, and other security documents using the Microsoft (MS) Excel spreadsheets in Artifact 18. The sealed Volume 3 must also contain the completed tables and worksheets on a CD ROM. See Section 2, RULES GOVERNING COMPETITION, Paragraph 2.4, Electronic Copy of RFP Available. Any assumptions included must be consistent with RFP requirements, assumptions and constraints, or the proposal will be rejected.

A copy of Volume 3 **without cost information** must be included in the unsealed bid along with Volume 1 and 2 and must be clearly labeled "Volume 3, Cost Proposal WITHOUT COST DATA for RFP HHSDC 4130-141A". **Inclusion of cost data in the unsealed "Cost Proposal without Cost Data" may result in elimination of the Bidder from further participation in the procurement process.**

The organization of Volume 3 must be:

Tab 1   Cost Methods and Assumptions

Tab 2   Total Proposal Cost Summary Exhibit Instructions

    Exhibit 1 - Total Proposal Cost Summary

Tab 3   DDI Phase Cost Instructions

    Exhibit 2 DDI Phase – Total Cost Summary

    Exhibit 2.1 DDI Phase - Hardware Cost by Project Year

    Exhibit 2.1.1 DDI Phase – Hardware Cost Description

    Exhibit 2.2 DDI Phase - Software Cost by Project Year

    Exhibit 2.3 DDI Phase – Contractor Services - Milestones

    Exhibit 2.3.1 DDI Phase - Contractor Services - Statewide Site Implementations

    Exhibit 2.4 DDI Phase - Contractor Services – Staff Hourly Rates for Maintenance and Enhancements

EXHIBIT 9-1 LETTER OF INTENT TO BID

(Sample)

Tom Burton
Senior Procurement Specialist
Department of General Services
Procurement Division
707 Third Street, 2nd Floor
West Sacramento, CA 95605

Reference: RFP HHSDC 4130-141A

This is to notify you that it is our present intent to (*Bidder shall specify*) **{submit/*not submit}** information in response to the above referenced RFP. The individual to whom all information regarding this RFP should be transmitted is:

Name:
Address:
City, State, & Zip
Phone Number: Fax Number:
Email Address:

*If declining to bid, please state reason(s) why:

Sincerely,

_____
Name (Signature)

_____
Typed Name and Title

_____
Company

(___)_____   (___)_____
Phone Number   Fax Number

_____
Email Address

EXHIBIT 9-2 PROPOSAL TRANSMITTAL FORM

Bidder organization name:		
Bidder organization address:	Street:	
	City:	
	State:	Zip:
Printed name of authorized person who can bind the company:		
Signature of person authorized to bind the company:		
Title of person signing the Bid:		
Phone number of Person signing the Bid:		
Date signed:		

This serves to validate our offer and agreement to the terms and conditions of the RFP.

I, _____ (Name)

    a. Acknowledge and agree to the terms and conditions of this RFP,
    b. Agree to provide the goods and services detailed in our proposal, for the price quoted, and
    c. Have contractual authority to bind the company.

_____
Signature

EXHIBIT 9-3 RESUME SUMMARY FORM

Bidders should read the following instructions prior to completing the Resume Summary Forms for the personnel being proposed. Incomplete or inaccurate information may result in the response receiving low scores during evaluation and may be enough to make the proposal nonresponsive. Since proposed resources will be evaluated and scored based on **meeting** and/or **exceeding** the Minimum and Desirable Qualifications for the position for which they have been proposed, it is very important that the completed Forms provide comprehensive and concise descriptions that will allow the Evaluation Team to evaluate the experience.

The Resume Summary Form must detail how the experience has been gained to meet each Minimum Qualification and Desirable Qualification, if applicable. Complete the forms using MS Word and as necessary expand the size of table cells or number of rows to accommodate required information. The Resume Summary Form requires the following information:

<u>**Applicant Project History Table:**</u>

List the project history for the applicant. If the experience was gained through more than one project, then an outline should be completed for each applicable project. The same project may be used for more than one requirement in the subsequent requirements tables. Note the Project Reference Number is in the first column of the Applicant Project History Table. Add more rows to the table if more than five projects are referenced.

- Project Name – The specific name of the project supported.

- Brief Project Description – This response shall be succinct yet provide background on the project, such as the project duration, size of the project, total contract value, technologies involved, and size and organization of the project team, if applicable. Some of the experience requirements state that experience with applications must be with applications "at least the size" and "scope" of the CMIPS II application. In these cases, the response shall include a description of the size and/or scope of the application in detail for the Evaluation Team to evaluate the experience.

- Start Date – The date (mm/yyyy) the proposed personnel started on the project. This date shall be the first full month the person was on the project.

- End Date – The date (mm/yyyy) that the proposed personnel left the project. This date shall be the last full month the person was on the project.

<u>**Requirement Tables:**</u>

- Requirement Experience Total (Yrs/Mos) – reflects the sum of the experience gained in all referenced projects for that requirement. For example if the applicant had 1 yr 2 months experience on project #1 and 4 yrs 1 month experience on project #2 for Requirement #1, then enter a total of 5 yrs / 3 mos.

- Project Reference # and Name – enter the applicable project reference # and name from the Resume Summary Form. The Bidder shall only use projects that meet applicable requirement criteria for size in contract value, number of users, or number of sites and ensure the supporting facts are included in the project description in Resume Summary Form.

- Yrs/Mos – Enter the experience gained for the project specified under Project Name for that requirement.

- Proposed Resource's Role, Responsibilities and Tasks Performed – This area shall identify the proposed resource's role in the project described above and provide information on assigned responsibilities, tasks performed, and applications and technologies used.

Note on Multiple Assignments - If a person was assigned to multiple projects at any given time, the Resume Summary Form must indicate the percentage of time the person was tasked to each assignment. The experience gained shall only include percent of time dedicated to that project and requirement. For example, if the applicants time was split 50% between two projects and one project was applicable to the requirement and the other was not, then if they worked one year on the two projects, they could only claim 6 months applicable experience.

RESUME SUMMARY FORM

CONTRACTOR PROJECT MANAGER

Proposed Resource Name:	

Organization associated with (check as appropriate): ☐ Prime Bidder   ☐ Subcontractor   ☐ DVBE

The Bidder shall list the project information required below that qualifies the proposed resource for the duties and responsibilities on this project for the proposed position classification. Note: This section must clearly describe how the proposed personnel meets each of the minimum requirements, and desirable requirements, if applicable, for the proposed position classification detailed in Section 6, TECHNICAL REQUIREMENTS - SOW, Paragraph 3.2.2.3, Key Staff. (*Use additional space/project reference boxes as necessary.*)

APPLICANT PROJECT HISTORY

PROJ. REF #	PROJECT NAME	BRIEF PROJECT DESCRIPTION	START DATE	END DATE
1				
2				
3				
4				
5				

Requirement #1:

A minimum requirement of 5 years project management experience and a desirable requirement of up to 10 years project management experience defined as performing all of the tasks defined in Appendix G of the Project Management Body of Knowledge	**Requirement Experience Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #2:

A minimum requirement of 2 years and a desirable requirement of up to 5 years project management experience, defined as performing all of the tasks defined in Appendix G of the Project Management Body of Knowledge for a large (at least $30 million contract value) system integration project(s)	Requirement Experience Total (Yrs/Mos):
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #3:

A minimum requirement of 3 years and a desirable requirement of up to 5 years management experience, defined as performing all of the tasks defined in Appendix G of the Project Management Body of Knowledge while managing a team greater than (50) people	Requirement Experience Total (Yrs/Mos):
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #4:

A desirable requirement of a Masters degree in a field related to the position
Post Graduate Degree Subject:
Education Facility:
Relationship to position:

Requirement #5:

A desirable requirement of up to 2 years experience managing, defined as performing all of the tasks defined in Appendix G of the Project Management Body of Knowledge, a project that adhered to IEEE 12207 Standards for Software Lifecycle Processes	**Requirement Experience Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #6:

A desirable requirement of up to 1 year experience managing, defined as performing all of the tasks defined in Appendix G of the Project Management Body of Knowledge, a project with SEI CMM Level 3 or higher certification	**Requirement Experience Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**

Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #7:

A desirable requirement of a Project Management Institute (PMI) Project Management Professional Certification	
PMI Project Management Professional Certification Date (Month/Year):	
PMP Number: **(Include a copy of the certification.)**	

Requirement #8:

A desirable requirement of up to 1 year project management experience, defined as performing some or all of the tasks defined in Appendix G of the Project Management Body of Knowledge, for state Social Services programs	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

RESUME SUMMARY FORM

CONTRACTOR TECHNICAL PROJECT MANAGER

Proposed Resource Name:	

Organization associated with (check as appropriate): ☐ Prime Bidder   ☐ Subcontractor   ☐ DVBE

The Bidder shall list the project information required below that qualifies the proposed resource for the duties and responsibilities on this project for the proposed position classification. Note: This section must clearly describe how the proposed personnel meets each of the minimum requirements, and desirable requirements, if applicable, for the proposed position classification detailed in Section 6, TECHNICAL REQUIREMENTS - SOW, Paragraph 3.2.2.3, Key Staff. *(Use additional space/project reference boxes as necessary.)*

APPLICANT PROJECT HISTORY

PROJ. REF #	PROJECT NAME	BRIEF PROJECT DESCRIPTION	START DATE	END DATE
1				
2				
3				
4				
5				

Requirement #1:

A minimum requirement of 5 years and a desirable requirement of up to 8 years experience in the role of Technical Project Manager as defined in Section 6, SOW, Paragraph 3.2.2.3.4, Contractor Technical Project Manager	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #2:

A minimum requirement of 2 years and a desirable requirement of up to 5 years project management experience, defined as performing tasks defined in Appendix G of the Project Management Body of Knowledge, in the integration, scope, risk, time, and cost management areas, for a large (at least $30 million contract value) system integration project(s)	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #3:

A minimum requirement of 3 years and a desirable requirement of up to 8 years of configuration design experience with the hardware proposed by the Contractor	**Total Yrs/Mos:**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #4:

A minimum requirement of 3 years and a desirable requirement of up to 8 years of implementation and tuning experience with the operating system proposed by the Contractor	**Requirement Experience Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #5:

A minimum requirement of 3 years and a desirable requirement of up to 8 years of database design experience with the database management system proposed by the Contractor	**Requirement Experience Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #6:

A minimum requirement of 3 years and a desirable requirement of up to 8 years of configuration and customization of the proposed COTS payroll package	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #7:

A minimum requirement of 3 years and a desirable requirement of up to 8 years of experience in implementing the hardware, operating system, COTS Payroll and database management system proposed by the Contractor across a Wide Area Network (WAN) to multiple remote locations	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #8:

A minimum requirement of 3 years and a desirable requirement of up to 8 years of experience in software design, to standards defined in IEEE 12207, Paragraph 5.3, Development Process	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #9:

A minimum requirement of 2 years and a desirable requirement of up to 5 years of security experience with the proposed architecture	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #10:

A desirable requirement of up to 2 years experience in the Contractor Technical PM role, as defined in Section 6, SOW, Paragraph 3.2.2.3.4, Contractor Technical Project Manager, for state Social Services programs	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #11:

A desirable requirement of up to 2 years experience in the Contractor Technical PM role, as defined in Section 6, SOW, Paragraph 3.2.2.3.4, Contractor Technical Project Manager, on a project that adhered to IEEE 12207 standards for System Life Cycle Processes	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #12:

A desirable requirement of up to 2 years experience in the Contractor Technical PM role, as defined in Section 6, SOW, Paragraph 3.2.2.3.4, Contractor Technical Project Manager, with an organization with SEI CMM Level 3 or higher certification	**Requirement Experience Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

RESUME SUMMARY FORM

CONTRACTOR SYSTEMS IMPLEMENTATION MANAGER

Proposed Resource Name:	

Organization associated with (check as appropriate): ☐ Prime Bidder ☐ Subcontractor ☐ DVBE

The Bidder shall list the project information required below that qualifies the proposed resource for the duties and responsibilities on this project for the proposed position classification. Note: This section must clearly describe how the proposed personnel meets each of the minimum requirements, and desirable requirements, if applicable, for the proposed position classification detailed in Section 6, TECHNICAL REQUIREMENTS - SOW, Paragraph 3.2.2.3, Key Staff. *(Use additional space/project reference boxes as necessary.)*

APPLICANT PROJECT HISTORY

PROJ. REF #	PROJECT NAME	BRIEF PROJECT DESCRIPTION	START DATE	END DATE
1				
2				
3				
4				
5				

Requirement #1:

	Requirement Experience Total (Yrs/Mos):
A minimum requirement of 4 years and a desirable requirement of up to 6 years experience as defined by planning, managing, and executing implementation tasks as defined in Section 6, SOW, Paragraph 4.5, Statewide Implementation	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #2:

A minimum requirement of 3 years and a desirable requirement of up to 5 years experience in Systems Implementation Management of a system with over 1,000 users	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #3:

A minimum requirement of 3 years and a desirable requirement of up to 5 years experience in Systems Implementation Management of a system with over 30 remote locations	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #4:

	Requirement Experience Total (Yrs/Mos):
A minimum requirement of 3 years and a desirable requirement of up to 5 years experience in managing a team of more than 12 staff	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #5:

	Requirement Experience Total (Yrs/Mos):
A desirable requirement of up to 1 year of project experience in state Social Services programs	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #6:

A desirable requirement of 1 year experience with large system implementations in counties within California	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

RESUME SUMMARY FORM

CONTRACTOR TEST MANAGER

Proposed Resource Name:	

Organization associated with (check as appropriate): ☐ Prime Bidder ☐ Subcontractor ☐ DVBE

The Bidder shall list the project information required below that qualifies the proposed resource for the duties and responsibilities on this project for the proposed position classification. Note: This section must clearly describe how the proposed personnel meets each of the minimum requirements, and desirable requirements, if applicable, for the proposed position classification detailed in Section 6, TECHNICAL REQUIREMENTS - SOW, Paragraph 3.2.2.3, Key Staff. *(Use additional space/project reference boxes as necessary.)*

APPLICANT PROJECT HISTORY

PROJ. REF #	PROJECT NAME	BRIEF PROJECT DESCRIPTION	START DATE	END DATE
1				
2				
3				
4				
5				

Requirement #1:

A minimum requirement of 3 years and a desirable requirement of up to 5 years experience as Test Manager, as defined in Section 6, SOW, Paragraph 3.2.2.3.7, Contractor Test Manager, for a project with over 1000 concurrent users	**Requirement Experience Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #2:

A minimum requirement of 5 years and a desirable requirement of up to 8 years experience executing formal, written functional, integration, and system test procedures in compliance with a widely recognized standard, such as IEEE or ISO	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #3:

A minimum requirement of 2 years and a desirable requirement of up to 5 years experience in managing test and validation plans, cases, and procedures in compliance with IEEE Standards 12207.1-1997	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #4:

A minimum of 2 years and a desirable requirement of up to 5 years experience in testing on a project using the same testing tools proposed by the Contractor	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #5:

A desirable requirement of up to 1 year project experience in state Social Services programs	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #6:

A minimum requirement of 1 year and a desirable requirement of up to 3 years experience managing a test team that was in compliance with IEEE 1012 Standards for System Verification and Validation	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

RESUME SUMMARY FORM

CONTRACTOR TRAINING MANAGER

Proposed Resource Name:	

Organization associated with (check as appropriate): ☐ Prime Bidder ☐ Subcontractor ☐ DVBE

The Bidder shall list the project information required below that qualifies the proposed resource for the duties and responsibilities on this project for the proposed position classification. Note: This section must clearly describe how the proposed personnel meets each of the minimum requirements, and desirable requirements, if applicable, for the proposed position classification detailed in Section 6, TECHNICAL REQUIREMENTS - SOW, Paragraph 3.2.2.3, Key Staff. *(Use additional space/project reference boxes as necessary.)*

APPLICANT PROJECT HISTORY

PROJ. REF #	PROJECT NAME	BRIEF PROJECT DESCRIPTION	START DATE	END DATE
1				
2				
3				
4				
5				

Requirement #1:

A minimum requirement of 2 years and a desirable requirement of up to 4 years experience as Training Manager for a business application with over 1000 concurrent users	Requirement Experience Total (Yrs/Mos):
Project Reference # and Name:	Yrs/Mos:
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	Yrs/Mos:
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	Yrs/Mos:
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #2:

A minimum requirement of 2 years and a desirable requirement of up to 4 years experience conducting training on a business application with over 1000 concurrent users	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #3:

A minimum requirement of 2 years and a desirable requirement of up to 4 years experience in developing and applying quality control procedures to training	**Requirement Experience** **Total (Yrs/Mos):**
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #4:

A minimum requirement of 2 years and a desirable requirement of up to 4 years experience in training on state Social Services programs	Requirement Experience Total (Yrs/Mos):
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

Requirement #5:

A minimum requirement of 2 years and a desirable requirement of up to 4 years experience managing a Training Team of over 10 trainers	Requirement Experience Total (Yrs/Mos):
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	
Project Reference # and Name:	**Yrs/Mos:**
Proposed Resource's Role, Responsibilities, and Tasks Performed:	

EXHIBIT 9-4 STATEMENT OF WORK TRACEABILITY MATRIX

(1) SOW REFERENCE	(2) TITLE	(3) PROPOSED PROJECT MASTER PLAN PARAGRAPH, TITLE	(4) PROPOSED MASTER WORK PLAN WBS NUMBER/ TASK TITLE	(5) PROPOSED PROJECT STAFFING PLAN PARAGRAPH /ROLE TITLE(S)
3	PROJECT MANAGEMENT			
3.1	PROJECT PLANNING			
3.1.1	Project Master Plan (PMP)			
3.1.2	Master Work Plan			
3.1.3	Schedule			
3.1.4	Budget Planning			
3.2	CONTROL PROCESSES			
3.2.1	Schedule and Budget Management			
3.2.2	Staffing Management			
3.2.3	Deliverable Standards and Acceptance Process			
3.2.4	Issue Management			
3.2.5	Change Management			
3.2.6	Configuration Management			
3.2.7	Risk Management			
3.2.8	Project Metrics			
3.2.9	Corrective Action Plan (CAP)			
3.3	PROJECT INITIATION			
3.4	PROJECT CLOSEOUT			
4	TECHNICAL PROCESSES			
4.1	SYSTEM DEVELOPMENT			
4.1.1	System Development Planning			
4.1.2	System Requirements Validation			
4.1.3	Concept of Operations Scenarios			
4.1.4	General System Design (GSD)			
4.1.5	Architecture Design Specification (ADS)			
4.1.6	Detailed System Design (DSD)			
4.1.7	Coding and Documentation			
4.1.8	Development Reporting and Metrics			
4.2	SYSTEM TEST AND EVALUATION			

(1) SOW REFERENCE	(2) TITLE	(3) PROPOSED PROJECT MASTER PLAN PARAGRAPH, TITLE	(4) PROPOSED MASTER WORK PLAN WBS NUMBER/ TASK TITLE	(5) PROPOSED PROJECT STAFFING PLAN PARAGRAPH /ROLE TITLE(S)
4.2.1	Test Planning and Deliverables			
4.2.2	Software Unit and Component Testing			
4.2.3	Integration Testing			
4.2.4	System Qualification Testing			
4.2.5	Regression Testing			
4.2.6	Release Readiness Review			
4.2.7	System Test and Evaluation Reporting and Metrics			
4.3	SYSTEM MAINTENANCE AND ENHANCEMENTS			
4.3.1	System Maintenance and Enhancement Overview			
4.3.2	Project Maintenance Planning			
4.3.3	Modification Management			
4.3.4	Defect Corrections			
4.3.5	Release Management			
4.4	SYSTEM OPERATIONS ADMINISTRATION			
4.4.1	System Operation Planning			
4.4.2	Data Distribution			
4.4.3	Capacity Planning and Management			
4.4.4	Operations Management			
4.4.5	System Security			
4.4.6	Backup and Recovery			
4.4.7	Data Archive			
4.4.8	Disaster Recovery			
4.4.9	Customer Service/Help Desk			
4.4.10	System Administration Reporting and Metrics			
4.5	STATEWIDE IMPLEMENTATION			
4.5.2	Statewide Implementation Planning			
4.5.3	Business Change Management			
4.5.4	System Deployment Preparation			
4.5.5	Release Installation			
4.5.6	Pilot Operation			

(1) SOW REFERENCE	(2) TITLE	(3) PROPOSED PROJECT MASTER PLAN PARAGRAPH, TITLE	(4) PROPOSED MASTER WORK PLAN WBS NUMBER/ TASK TITLE	(5) PROPOSED PROJECT STAFFING PLAN PARAGRAPH /ROLE TITLE(S)
4.5.7	County Deployment			
4.5.8	CDSS Deployment			
4.5.9	Business Services Migration			
4.5.10	Implementation Reviews			
4.5.11	Implementation Reporting and Metrics			
4.6	PROGRAM SUPPORT			
4.6.1	Program Support Planning			
4.6.2	Case Management Services			
4.6.3	Payroll Processing Services			
4.6.4	Program Integrity Services			
4.6.5	Funding Source Management			
4.6.6	Website Management			
4.6.7	Forms Support			
4.6.8	Reporting Support			
4.6.9	Project Service Requests			
4.6.10	CDSS APB Infrastructure Support			
4.6.11	Legal Impact Analysis Services			
4.6.12	Program Support Reporting and Metrics			
5	SUPPORTING PROCESSES			
5.1	COMMUNICATION			
5.2	DOCUMENTATION MANAGEMENT			
5.3	QUALITY MANAGEMENT			
5.3.1	Product Assurance			
5.3.2	Verification and Validation			
5.3.3	Process Assurance			
5.3.4	Joint Reviews			
5.3.5	Quality Reporting and Metrics			
5.4	SUBCONTRACTOR MANAGEMENT			
5.5	PROCESS IMPROVEMENT			
5.6	FACILITIES			
5.7	HARDWARE AND SOFTWARE			
5.7.1	Purchase			
5.7.2	Hardware Maintenance			

(1) SOW REFERENCE	(2) TITLE	(3) PROPOSED PROJECT MASTER PLAN PARAGRAPH, TITLE	(4) PROPOSED MASTER WORK PLAN WBS NUMBER/ TASK TITLE	(5) PROPOSED PROJECT STAFFING PLAN PARAGRAPH /ROLE TITLE(S)
5.7.3	Software Maintenance			
5.7.4	Refresh			
5.7.5	CDSS APB Hardware and Software			
5.7.6	Inventory Management			